

# HR306

## Configuration of Time Recording

*mySAP ERP Human Capital Management*

Date \_\_\_\_\_  
Training Center \_\_\_\_\_  
Instructors \_\_\_\_\_  
Education Website \_\_\_\_\_

### **Participant Handbook**

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*An SAP course - use it to learn, reference it for work*

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# About This Handbook

This handbook is intended to complement the instructor-led presentation of this course, and serve as a source of reference. It is not suitable for self-study.






## Typographic Conventions

American English is the standard used in this handbook. The following typographic conventions are also used.

Type Style	Description
<i>Example text</i>	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths, and options.  Also used for cross-references to other documentation both internal (in this documentation) and external (in other locations, such as SAPNet).
<b>Example text</b>	Emphasized words or phrases in body text, titles of graphics, and tables
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example SELECT and INCLUDE.
Example text	Screen output. This includes file and directory names and their paths, messages, names of variables and parameters, and passages of the source text of a program.
<b>Example text</b>	Exact user entry. These are words and characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.

## Icons in Body Text

The following icons are used in this handbook.

Icon	Meaning
	For more information, tips, or background
	Note or further explanation of previous point
	Exception or caution
	Procedures
	Indicates that the item is displayed in the instructor's presentation.

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# Course Overview

This training course teaches you how to configure time recording.

## Target Audience

This course is intended for the following audiences:

- Project teams
- Consultants

## Course Prerequisites

### Required Knowledge

- HR050: Business Processes in Human Capital Management
- HR100: Basics of Personnel Administration and HR120: Basics of Personnel Planning

### Recommended Knowledge

- HR305 Configuration of Master Data



## Course Goals

This course will prepare you to:

- Explain the prerequisites for SAP R/3 Time Management
- Configure work schedules and the corresponding elements
- Set up absences and attendances and attendance/absence counting
- Set up absence and attendance entitlements and their accrual and deduction
- Set up the Time Manager's Workplace
- Integrate infotypes with other applications



## Course Objectives

After completing this course, you will be able to:

- Explain the prerequisites for SAP R/3 Time Management
- Configure work schedules and their corresponding elements
- Set up absences and attendances and attendance/absence counting
- Set up absence and attendance entitlements and their accrual and deduction
- Configure the Time Manager's Workplace

- Explain the integration of infotypes with other applications

## **SAP Software Component Information**

The information in this course pertains to the following SAP Software Components and releases:

# *Unit 1*

## **Introduction to SAP Time Management**

### **Unit Overview**

This unit provides an overview of HR Time Management and how it is integrated with other applications.



### **Unit Objectives**

After completing this unit, you will be able to:

- Explain the prerequisites for SAP R/3 Time Management

### **Unit Contents**

Lesson: Introduction to Time Management .....2

## Lesson: Introduction to Time Management

### Lesson Overview

This lesson provides an overview of HR Time Management and how it is integrated with other applications.



### Lesson Objectives

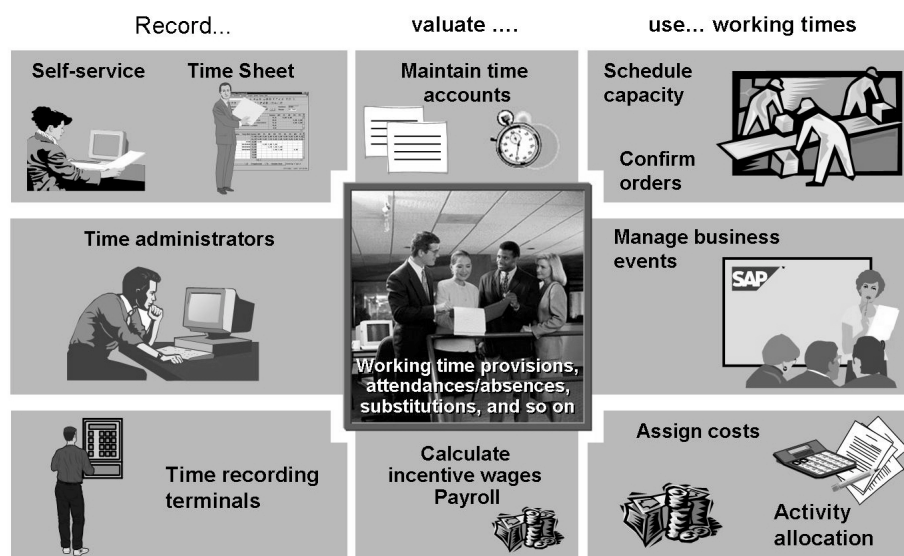
After completing this lesson, you will be able to:

- Explain the prerequisites for SAP R/3 Time Management

### Business Example

You want to get an overview of the implementation options in SAP R/3 Time Management.

### Introduction to Time Management



**Figure 1: Time Management: An Overview**

Information on the work performed by employees and their availability to work are essential elements of a human resources management system. This time data is transferred to other application areas, such as Controlling and Logistics, and is an influential factor in enterprise-wide decision-making.

Time Management provides you with a flexible means of setting up, recording, and evaluating working times.



Information about working times is transferred to Payroll to calculate employees' gross pay.

There are various options for recording working times: Manually entering time data online, using time recording terminals, or employees using self-service applications.

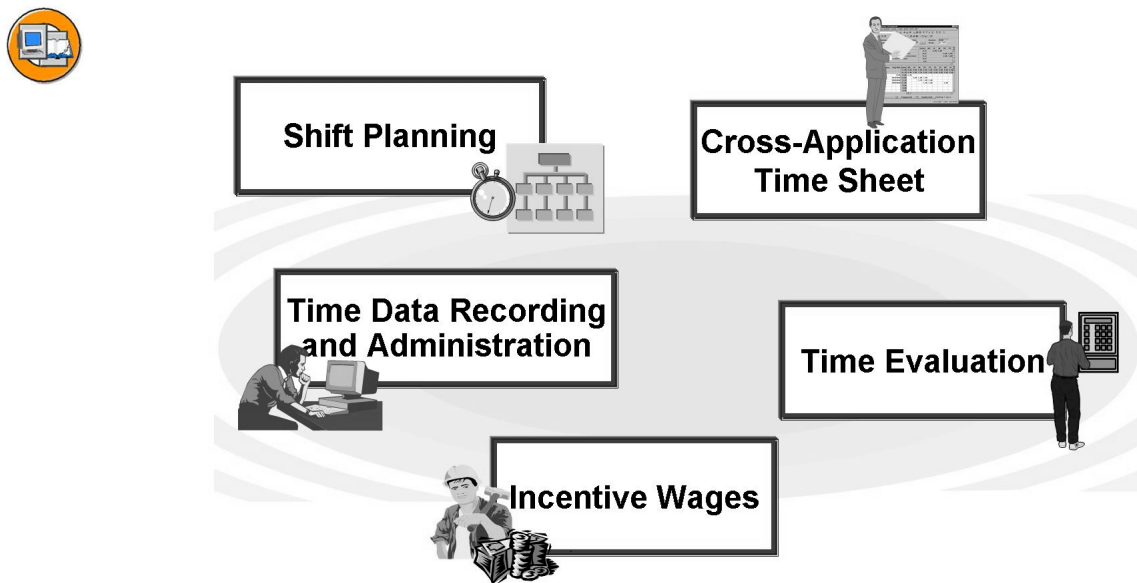
Time accounts (leave, flextime, and so on) can be managed manually or automatically.

Working times can be allocated as activities in Controlling, and the resultant costs can be assigned to the appropriate source.

Time management information is used within logistics to determine employee availability for capacity planning purposes.

Enterprise work requirements can be determined and employee shifts scheduled.

Time tickets can be generated automatically from Plant Data Collection (PDC) postings.



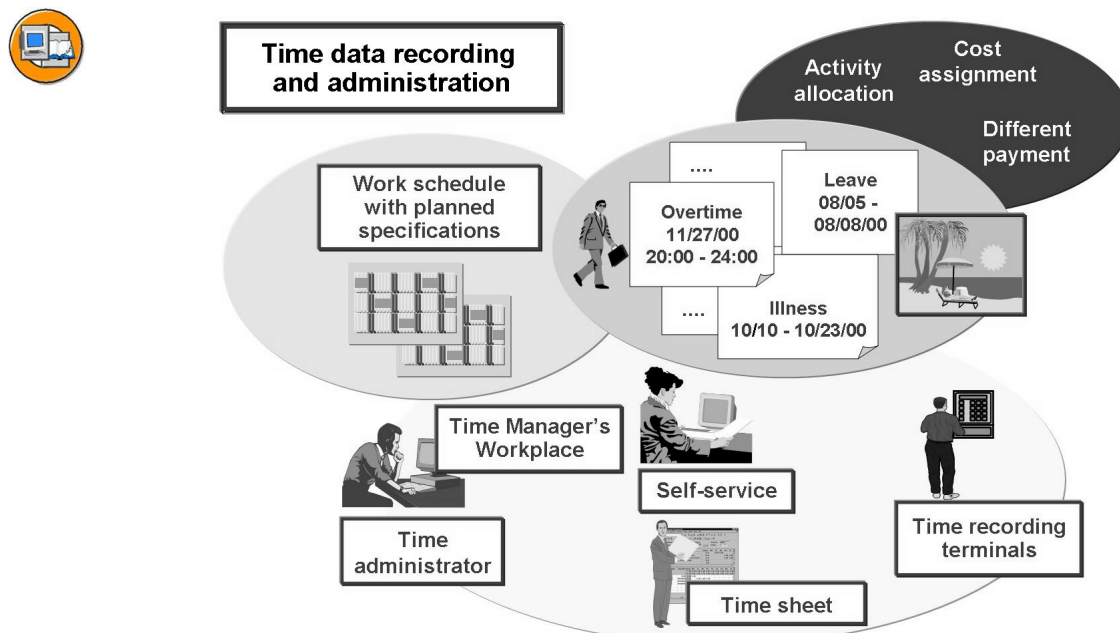
**Figure 2: SAP Components for Time Management**

The scope of functions available in Time Management can be customized according to the requirements of your enterprise. This ranges from simple administration of leave and illness times to planning personnel capacity, valuating attendance and absence times using time accounts, determining overtime and bonus wage types, and processing incentive wages data (such as piecework, for example). There are various components in Time Management, which you can use individually or together.

Employees can use the **Cross-Application Time Sheet** to enter their own actual times. Time data can be recorded and transferred to Controlling, Human Resources, and Logistics for further processing. Time data can be recorded as attendances, absences, and employee remuneration information for Human Resources.

The **Incentive Wages** component enables you to implement performance-related compensation. In this way, you can set up different types of wages based on time, premiums, or piecework. You can implement incentive wages for individuals or groups. Incentive wages reads employee data from the logistics system, prepares the data according to the type of payment and transfers the data to payroll.

**Shift Planning** allows you to quickly and efficiently schedule the human resources in your enterprise. In this way, you can assign shift times, locations, type of personnel, and number of required employees to optimally staff your enterprise.



### Figure 3: Time Data Recording and Administration

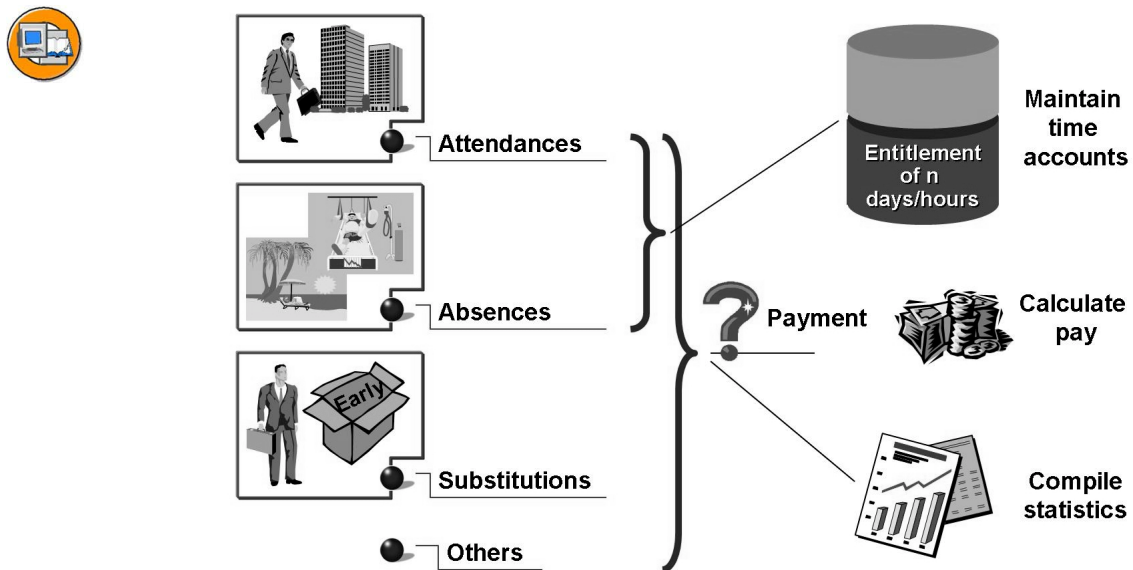
The central element in Time Management is the employee's work schedule. It contains the planned specifications (including breaks), according to which employees are to work.

In addition, time data such as illnesses, leave, and business trips are recorded for employees. Depending on the type of time management in your enterprise, you record only deviations from the employee work schedules or only the complete actual times.

There are various options for recording working times: Manually entering time data online, using time recording terminals, or employees using self-service applications. Time data is processed in the same way, regardless of which recording method is used. Time Management supports centralized data entry by administrators, decentralized time entry by employees in individual departments (such as a supervisor in the production area), or by employees themselves.

Information about different payments can also be entered along with time data.

Working times can be allocated as activities in Controlling, and the costs resulting from working times can be assigned to the appropriate source.



**Figure 4: Time Recording Methods (1)**

Time data such as changes in planned specifications, attendances (time worked, business trips, or additional training), absences (leave, illness, and so on) is recorded for employees.

You can use this time data to:

Determine the applicable overtime bonuses for overtime worked. For example, you want to compensate work on Sundays at a different rate than that used for normal workdays.

Maintain time accounts. For example, you may not want to remunerate overtime, but instead have it accrued in a time account (time off from overtime, for example) that is available to the employee. When the employee takes the corresponding time off (= absence), then this amount is deducted from the time off in lieu of overtime account.

Compile statistics. Evaluations of overtime levels or illness-related absences in individual departments can be created.

Specifications for different payment or account assignment information can also be entered along with time data. Certain time data (attendances, absences, employee remuneration info) can also be recorded for internal activity allocation purposes. This additional information is evaluated in Payroll and Controlling.



#### Record only deviations from work schedule

<i>Doctor's appt</i>	11:00	14:00	2.5 hrs
----------------------	-------	-------	---------



**Work schedule =  
Actual and  
planned**

#### Record all times

<i>Attendance</i>	08:00	11:00	3 hrs
<i>Doctor's appt</i>	11:00	14:00	2.5 hrs
<i>Attendance</i>	14:00	17:00	3 hrs



**Recorded times =  
Actual  
Work schedule =  
Planned**

**Figure 5: Time Recording Methods (2)**

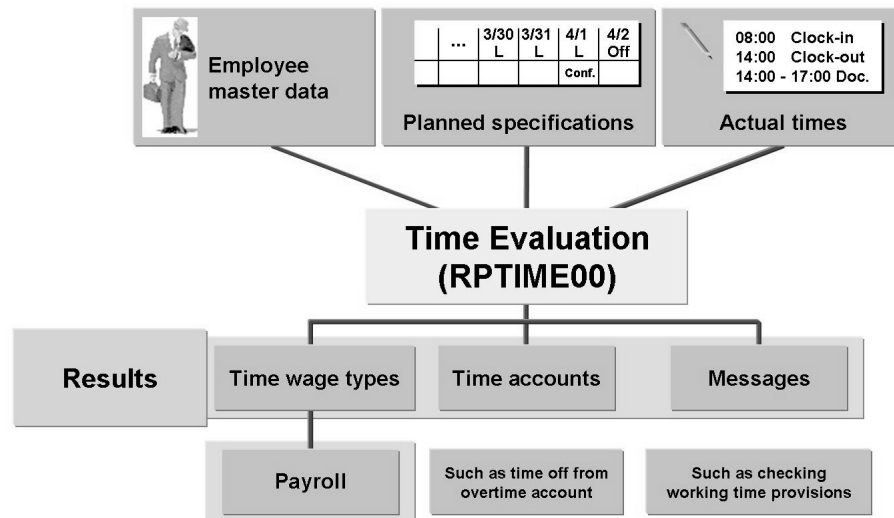
There are two different methods for transferring employee time data to the SAP R/3 System.

#### 1. Recording only deviations from the work schedule

Only time data that represents an exception to the employee's work schedule is recorded. You can include the most current data, such as employee illnesses, schedule and record substitutions, and enter annual leave for employees.

#### 2. Recording actual times

This method records all actual times, that is, all transactions such as actual working times, absences, and so on.



**Figure 6: Time Evaluation**

Employees' time data is valued in time evaluation. Time evaluation determines planned working times and overtime, manages time accounts (flextime balances, overtime, productive hours, and so on), creates wage types (for overtime or bonus wage types, for example), updates time quotas, and checks working time provisions (such as core time violations). The time wage types created during time evaluation are valued in Payroll.

Time evaluation is carried out by a time evaluation driver called RPTIME00. The steps to be carried out by RPTIME00 are specified in a personnel calculation schema.

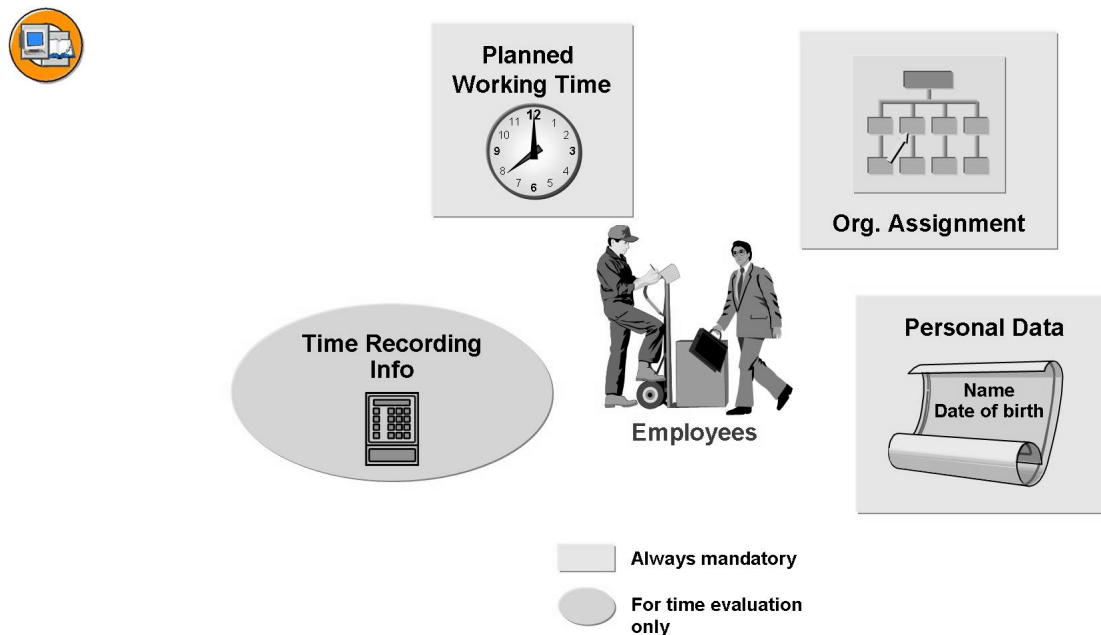
The standard system contains several personnel calculation schemas that cover various requirements and strategies for evaluating data. Schemas are available for, amongst other things:

Time management that records all actual working times of employees, in addition to deviations to the work schedule

Time management that only records the deviations to the work schedule

The processing of time data for which only the work duration, not the start and end times, are recorded

The processing rules for time evaluation can be modified to suit the specific requirements of your enterprise.



**Figure 7: Required Infotypes in Time Management**

In Time Management, certain master data infotype records must be available for each employee. Time management data is stored in the same master data records used in other human resources areas such as Payroll and Personnel Administration.

The following infotypes are required for the integration of time management master data records:

**Organizational Assignment (0001)**

**Personal Data (0002)**

**Planned Working Time (0007):**

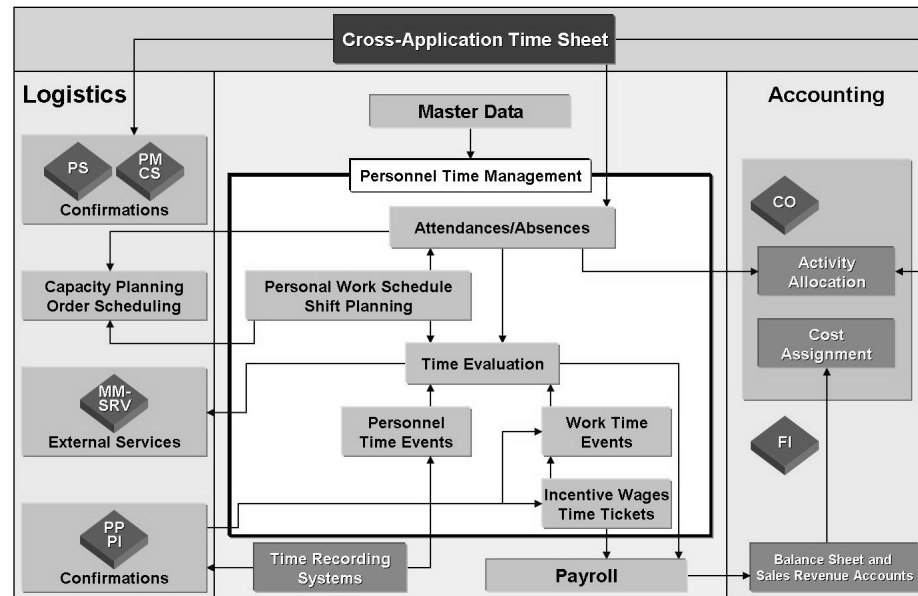
The appropriate Time Management status must be stored in this infotype. It determines whether and how employee time data is to be processed in Time Evaluation or Payroll.

**Time Recording Information (0050):**

This infotype is used only if time evaluation is used. It can contain interface data for the subsystem and additional employee information for the purposes of time evaluation.

**Absence Quotas (2006) to manage leave**

**Note:** The *Payroll Status* infotype (0003), which the system usually creates when an employee is hired, determines the earliest recalculation date and when time evaluation is to be run next.



**Figure 8: Integration with Other Components**

This diagram shows an overview of the entire Time Management process.

Time Management is directly and indirectly linked with various components, both within Human Resources and with other applications.

**Examples:**

1. Working times entered in the Cross-Application Time Sheet are transferred as attendances to Time Management and as confirmations to Logistics. Attendances are transferred to Time Evaluation for further processing. Time balances and time types are formed, which are then transferred to payroll. Finally, the results are transferred to payroll. The payroll results are transferred to Accounting. In Accounting, the master cost center of the employees is debited according to the information from the confirmation.
2. Employee attendances and absences serve as information about employees' availability for capacity planning in Logistics.
3. Working times recorded in time recording systems are transferred as personnel time events to Time Management and are processed in Time Evaluation. Wage types formed are transferred to Payroll.



## Lesson Summary

You should now be able to:

- Explain the prerequisites for SAP R/3 Time Management





## Unit Summary

You should now be able to:

- Explain the prerequisites for SAP R/3 Time Management





## Test Your Knowledge

1. In SAP Time Recording, is it possible to choose whether to record all times or just the deviations from the work schedule?

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False



## Answers

1. In SAP Time Recording, is it possible to choose whether to record all times or just the deviations from the work schedule?

**Answer:** True

SAP supports both recording of all actual times and recording of only the deviations from the work schedule.

# Unit 2

## Overview of Time Recording

### Unit Overview

This unit provides an introduction to the time management roles and describes the various options for recording time data.



### Unit Objectives

After completing this unit, you will be able to:

- Describe the roles in Time Management
- Name the various options for time recording

### Unit Contents

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## Lesson: Roles in Time Management

### Lesson Overview

In this lesson, you learn about the roles in Time Management.



### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the roles in Time Management

### Business Example

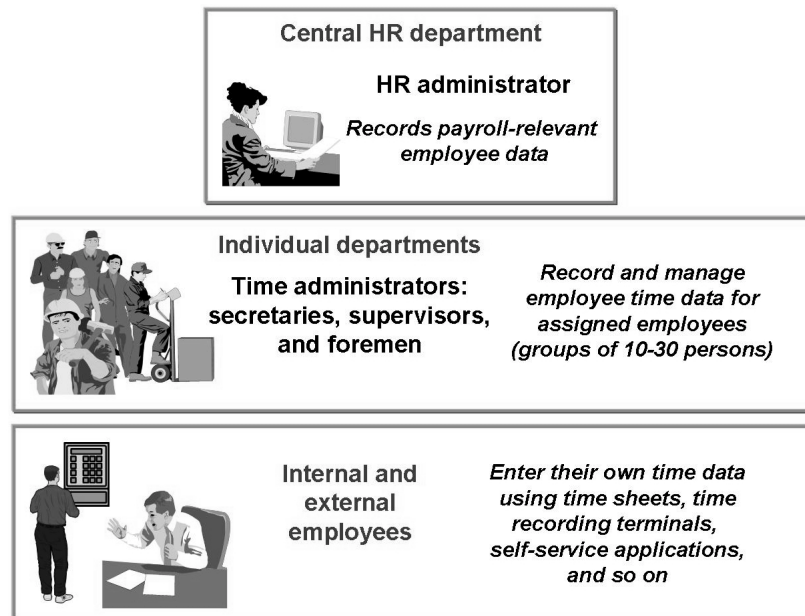
Employees at your enterprise work according to the times specified in their work schedules. However, deviations can occur. Employees call in sick, go on vacations, fill in for other employees, work overtime, and so on.

The recording of time data is decentralized at your company:

- People such as team leads, supervisors, and secretaries in individual departments are responsible for correctly entering and maintaining the time data for the employees in their departments.
- Employees enter some time data (such as leave requests) themselves.

HR administrators in the corporate HR department are responsible for entering any additional payroll-relevant data for employees, when necessary.

## Roles in Time Management



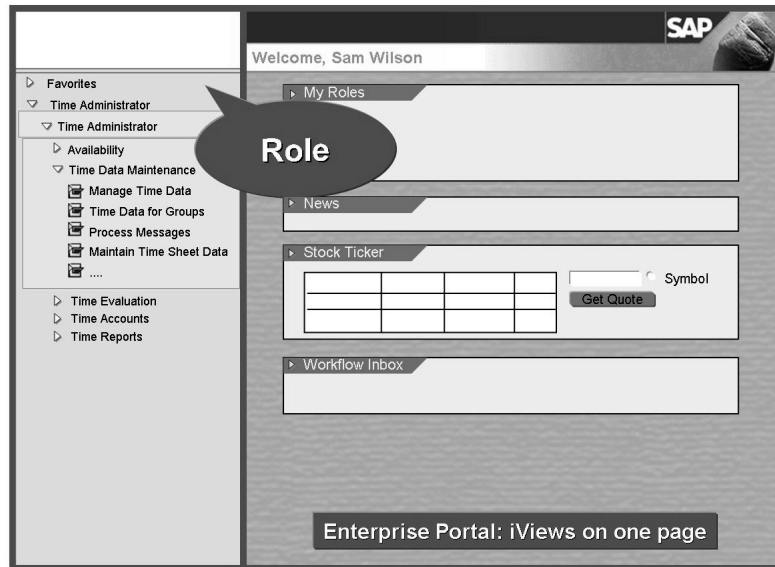
**Figure 9: Who Records Time Data?**

Entering, maintaining, and evaluating employee time data is often decentralized, that is, the time data is processed in individual departments, not centrally in the HR department.

The main characteristic of decentralized time management is the delegation of time-management tasks to individual departments. Persons who carry out time-management tasks in the departments are usually responsible for small- to medium-sized groups of 10 to 30 employees.

Another aspect of decentralization is the inclusion of employees themselves. For example, employees record their own working times using self-service applications and access information on their work schedules, time accounts, and so on.

HR administrators in the central HR department are responsible for entering any additional payroll-relevant data for employees, when necessary. This data is usually of a sensitive pay-related or administrative nature, such as specifications for continued pay in the event of illness.



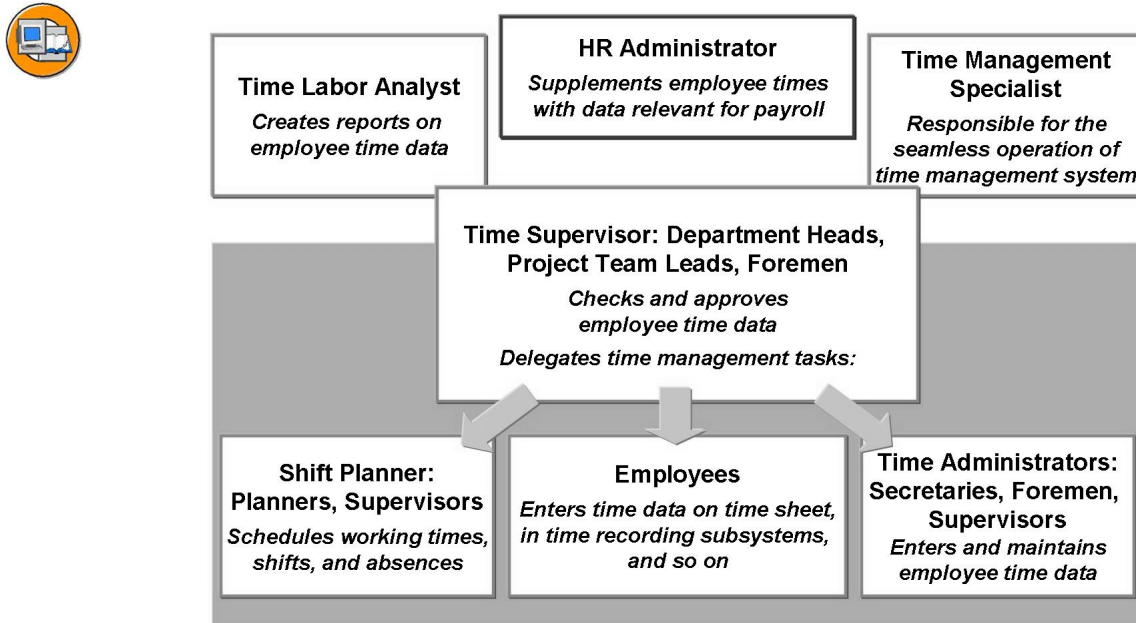
**Figure 10: Roles in SAP R/3 or the Enterprise Portal**

The Enterprise Portal (EP) is a portal for employees or managers from which they have access to their role-specific user menus and iViews defined for them. If you do not use the Enterprise Portal, you can set up your user roles in the SAP R/3 System. Your role-specific menu is then displayed if you choose the user menu instead of the SAP Easy Access Menu.

From a business perspective, **roles** correspond to certain tasks and functions that employees carry out in an enterprise. From a technological point of view, roles are simply a collection of specific menus and functions required to perform these tasks. Users access the transactions, reports, and Web-based applications contained in the roles from user menus. User menus contain only the functions required for completing the typical daily tasks of specific users. A role also contains the necessary access authorizations. You can assign as many users to a role as you require.

**Composite roles** contain several single roles. For example, the composite role "HR Controller" consists of the single role "Employee Time and Labor Controller," in addition to other single roles.





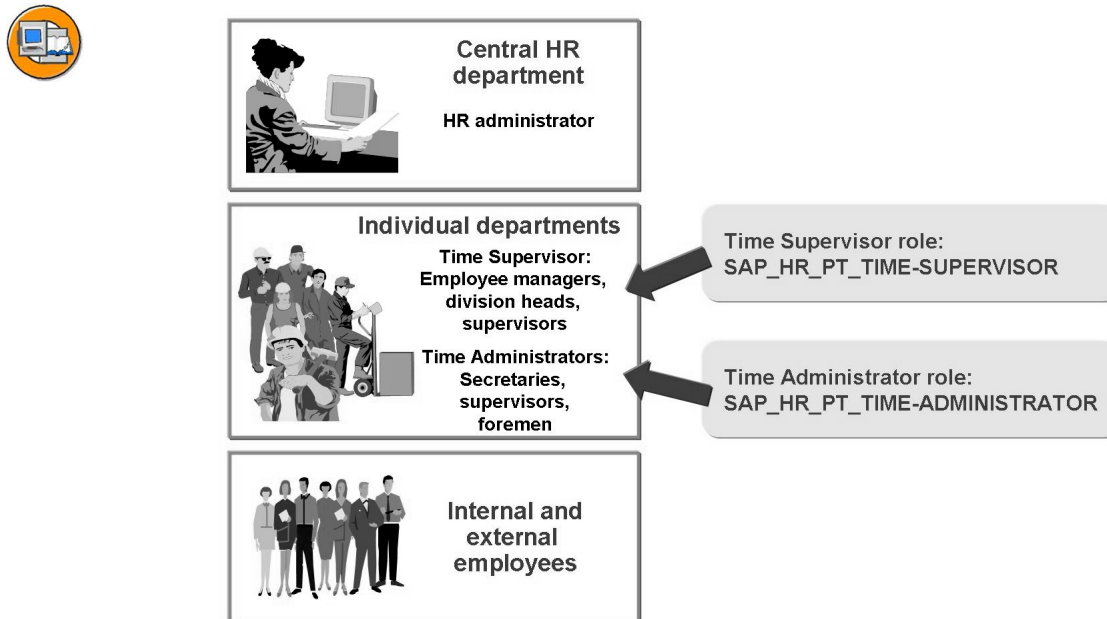
**Figure 11: Overview of Roles in Time Management**

The figure above displays an overview of the single roles in Time Management.

The **Time and Labor Analyst** monitors employee time and labor data in relation to strategic company goals. He or she creates reports detailing the work levels of all departments or employee groups and overtime levels, for example. The single role **Time and Labor Analyst** (SAP\_HR\_PT\_TIME-LABOR-ANALYST) is assigned to the composite role **HR Analyst** (SAP\_WP\_HR-ANALYST).

The **Time Management Specialist** is responsible for the seamless operation of the time management system. He or she is concerned with the technical side of the SAP R/3 System. The Time Management Specialist tasks include making recurring settings, maintaining interfaces to other systems and SAP applications, and, when required, modifying or adding to HR-specific Customizing. The single role **Time Management Specialist** (SAP\_HR\_PT\_TIME-MGMT-SPECIALIST) is contained in the composite role **HR Systems Specialist** (SAP\_WP\_HR-SYSTEM-SPEC).

The **Shift Planner** role is carried out by employees in individual departments in an enterprise, for example, by supervisors and department heads. Shift Planners schedule working times, shifts, or known absences for the employees assigned to them. They take account of employee qualifications, working time preferences, legal regulations, company policies, and cost aspects during planning. The composite role **Shift Planner** (SAP\_WP\_SHIFT-PLANNER) contains the single role **Shift Planner** (SAP\_HR\_PT\_SHIFT-PLANNER).



**Figure 12: Important Roles in Time Recording**

Important roles for decentralized time management are the roles of Time Supervisor and Time Administrator. These roles can also be carried out by the same person.

The **Time Supervisor** is responsible for planning and administering employee time and labor. Time Supervisors delegate certain time management tasks to employees in their departments (such as to Time Administrators). The Time Supervisor role is carried out by senior employees in individual departments in an enterprise, such as managers, department heads, or foremen. The single role **Time Supervisor** (SAP\_HR\_PT\_TIME-SUPERVISOR) is contained in the composite role **Manager Generic** (SAP\_WP\_MANAGER).

**Time Administrators** are responsible for correctly recording and maintaining the time data of employees assigned to them, in addition to their other job tasks. The role of Time Administrator comprises checking employee availability, entering changes in working time, absences, attendances, and bonuses, including information required for posting or payment. The composite role **Time Administrator** (SAP\_WP\_TIME-ADMINISTRATOR) contains the single role **Time Administrator** (SAP\_HR\_PT\_TIME-ADMINISTRATOR).

Employees can use the Internet or intranet to enter or display their own time data, thus relieving the corporate HR department and departmental time administrators of these tasks.



## Lesson Summary

You should now be able to:

- Describe the roles in Time Management

## Lesson: Time Recording Options

### Lesson Overview

This lesson provides an overview of the options for time data recording.



### Lesson Objectives

After completing this lesson, you will be able to:

- Name the various options for time recording

### Business Example

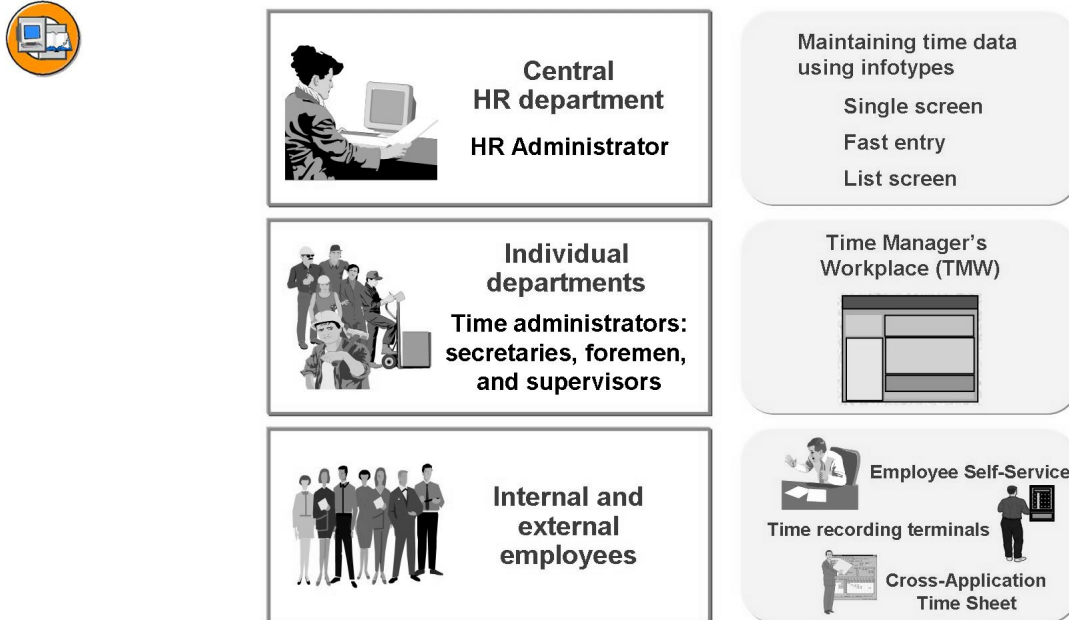
Employees at your enterprise work according to the times specified in their work schedules. However, deviations can occur. Employees call in sick, go on vacations, fill in for other employees, work overtime, and so on.

The recording of time data is decentralized at your company:

- People such as team leads, supervisors, and secretaries in individual departments are responsible for correctly entering and maintaining the time data for the employees in their departments.
- Employees enter some time data (such as leave requests) themselves.

HR administrators in the corporate HR department are responsible for entering any additional payroll-relevant data for employees, when necessary.

## General Data Entry Options



**Figure 13: Time Recording Options**

In decentralized time management, administrators in the central HR department only have to supplement the employee time and labor data with payment-related or other administrative information. These HR administrators use the functions provided in **Infotype Maintenance** for single screen, list screen, and fast entry since they correspond in principle to the infotype maintenance in personnel administration.

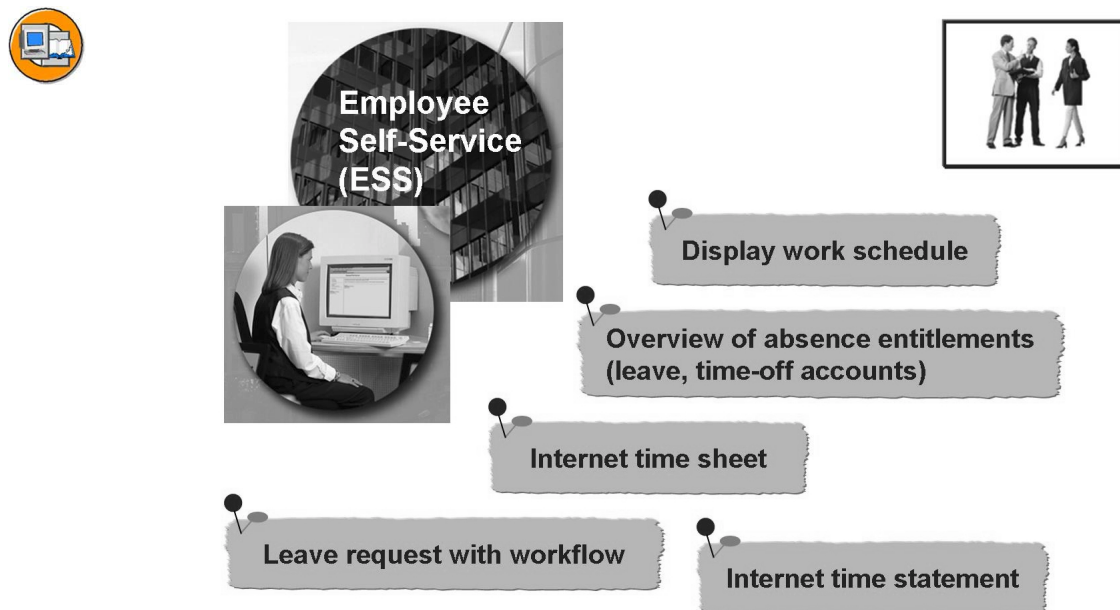
The **Time Manager's Workplace (TMW)** was developed for the needs of decentrally-organized time administrators. The TMW is a user-friendly interface that streamlines recording and maintaining time data and processing messages.

The following options are available to employees for recording or displaying their own personal data:

Front-end time recording terminals

Employee self-service applications in the Internet or intranet

The Cross-Application Time Sheet



**Figure 14: Employee Self-Services in Time Management**

The following Internet Application Components (IACs) for time management are also available for employees to display and maintain their own data:

#### **Display Personal Work Schedule**

Display Time Accounts (absence entitlements):

Employees can find out information about their past, current, or future absence entitlements.

#### **Internet Time Statement:**

If you evaluate employee data using time evaluation, employees can use the time statement to get an overview of the day- and period-based balances and wage types determined for them during time evaluation. Employees can also display and print their time statement on the Internet.

#### **Internet Time Sheet:**

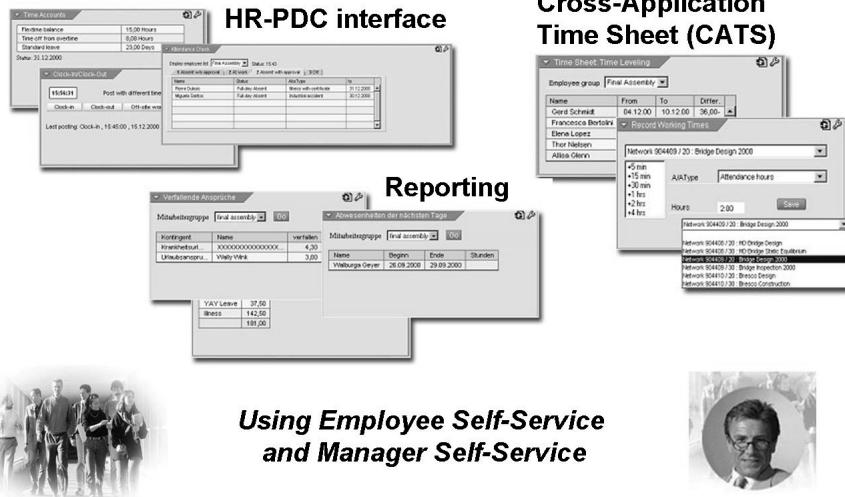
This service enables employees to enter their own working times in a time sheet from the Internet or company intranet.

#### **Leave Request with Workflow:**

This service allows employees to submit a leave request or inform their supervisor that they need to be absent for a particular period of time (such as for illness). A workflow is triggered when an employee creates a leave request whereby the request is automatically sent to the Internet/intranet inbox of that employee's manager. The employee's manager can approve or reject the leave request.



- The Enterprise Portal contains a range of iViews for displaying and maintaining time data:



**Figure 15: Enterprise Portal: iViews for Time Management**

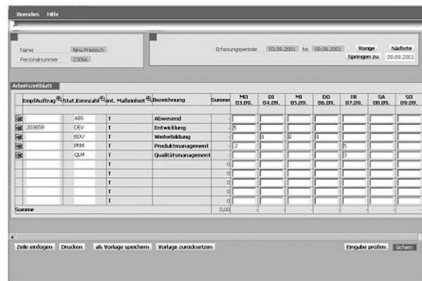
You can query and maintain time management data directly using the employee portal (employee self-service) or the manager portal (manager self-service).

The system accesses the HR\_PDC interfaces or the Cross-Application Time Sheet (CATS) for time data maintenance in the background.

iViews are simple, self-contained applications that are displayed on a page in the Enterprise Portal. The slide shows various time management examples from the range of iViews available in the Enterprise Portal.

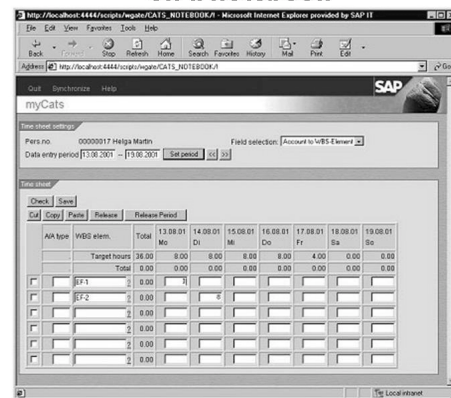


**By employee self-service  
in the Enterprise Portal**



**Approval via  
workflow**

**By an offline variant  
on a notebook**



**Figure 16: CATS: Other Data Entry Options**

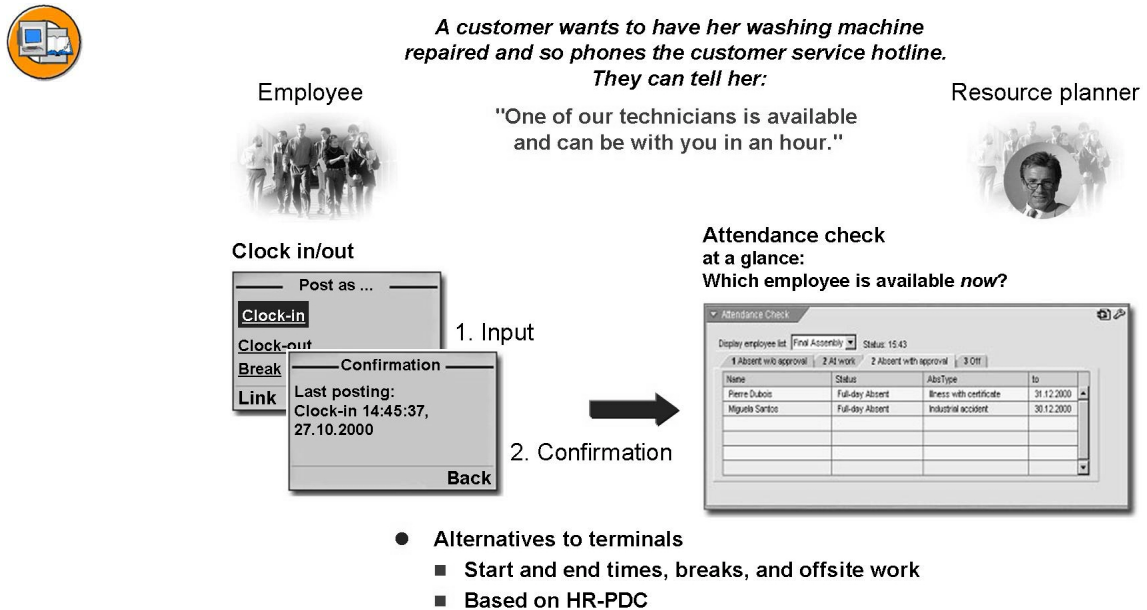
An Internet version of the Cross-Application Time Sheet is available for employees. It can be accessed and maintained via Employee Self-Service (ESS) in the browser.

*CATS notebook* is the name of the offline variant that can be installed locally on a laptop. This enables data to be entered even when there is no connection to the SAP R/3 System; it can subsequently be synchronized with the system. This user interface is available with SAP R/3 4.6C and above. For more information, see SAP Note 497017.

The data can, of course, still be maintained directly in the SAP R/3 System.

For more information, see [www.service.sap.com/hr](http://www.service.sap.com/hr) or [www.help.sap.com](http://www.help.sap.com).





**Figure 17: Clock In/Out Using WAP**

A new CATS function is the ability to post time events and time data using a WAP-enabled mobile device.

WAP stands for "Wireless Application Protocol" and is the protocol layer for data transfer via mobile devices such as cellular phones.

The connection to the SAP R/3 System is provided by the usual interface for time events, HR\_PDC.

The posting is processed in the R/3 System and can then be displayed using an ESS scenario, for example.

WAP signifies:

Business processes tailored to employees' needs

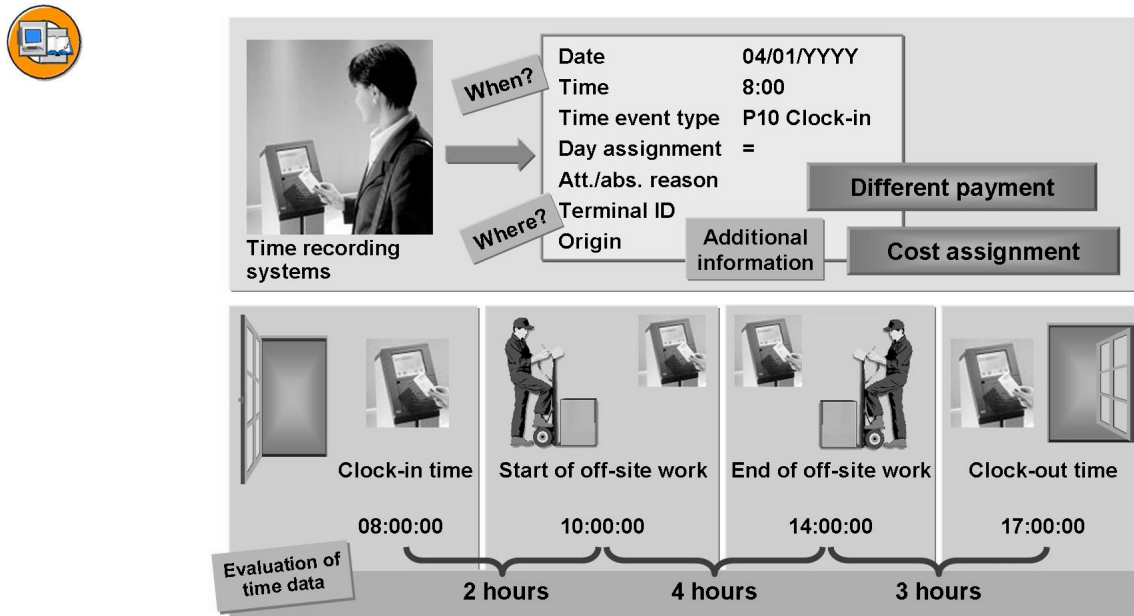
Focus on a minimum of information

Optimized default values

Minimized user input

Minimal screen switches

PIN (security)

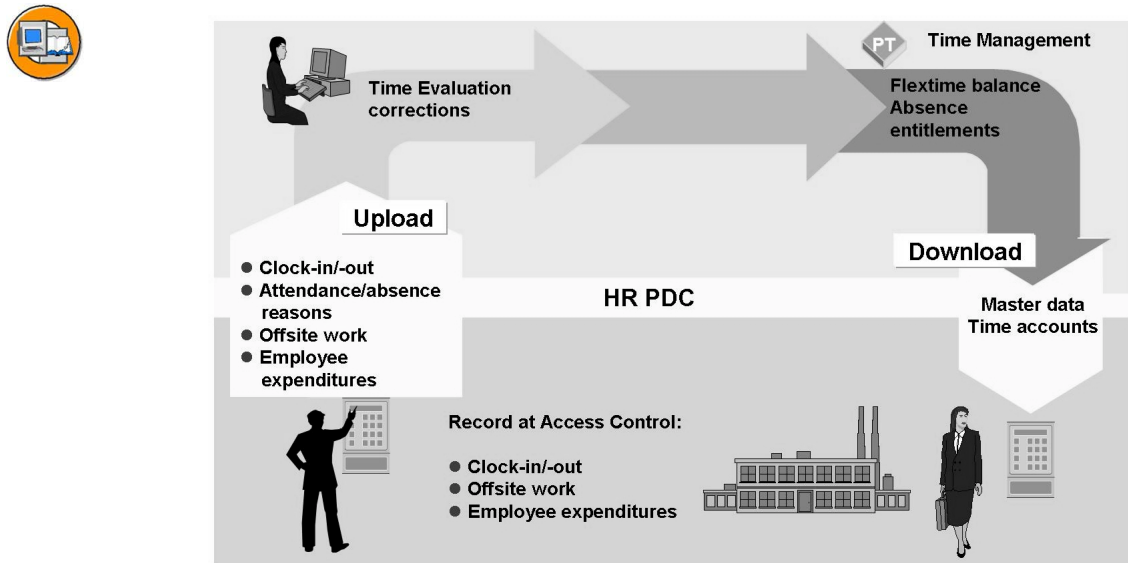


**Figure 18: Time Recording Systems (1)**

Employees can record time events (such as clock-in or clock-out postings) at external time recording terminals. Additional information on cost assignment and different payment can also be entered.

Time events have to be uploaded to the SAP R/3 System. Similarly, certain data from the SAP R/3 System must be available at the time recording terminals. Communication between time recording systems and HR Time Management takes place via a standardized interface called **Plant Data Collection: Time & Attendance and Employee Expenditures (HR-PDC)**. Using this standardized interface, you can upload time events and employee expenditures recorded by external recording systems to SAP R/3 Time Management. In the same way, master data, control data, and transaction data (such as employee balances) are downloaded to the recording system.

Time events processed in Logistics during a plant data collection can also be uploaded to the SAP R/3 System via standardized interfaces. This data can also be transferred from individual Logistics components to Human Resources, if required.



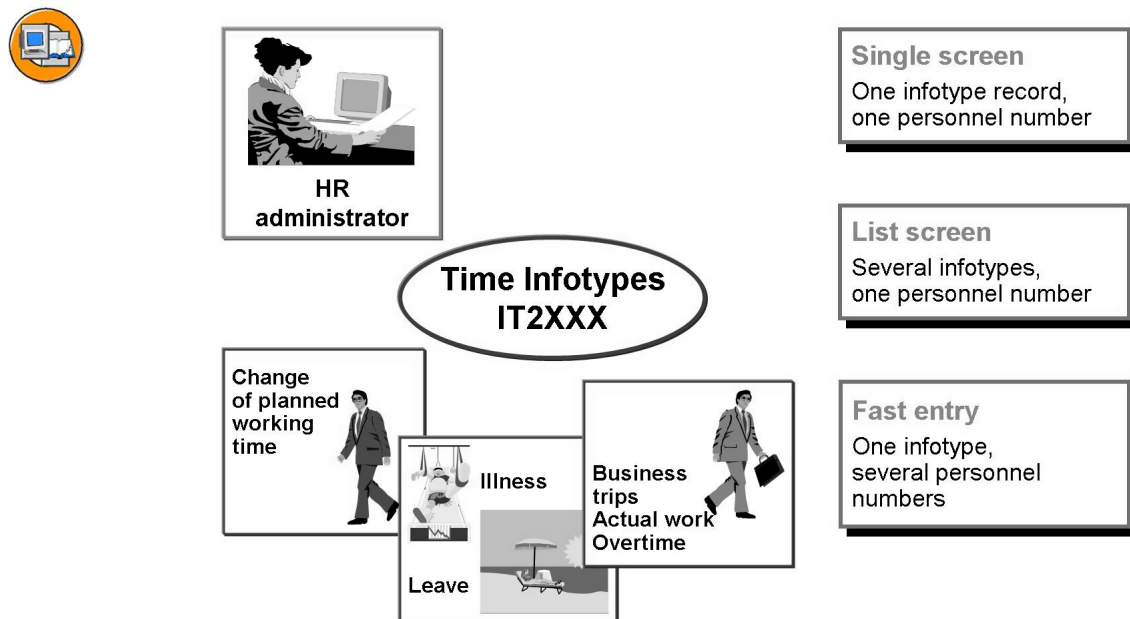
**Figure 19: Time Recording Systems (2)**

#### **Upload:**

Time events are uploaded to the SAP R/3 System (after an upload request). Data can be uploaded several times daily. The data is stored in the CC1TEV table in the SAP R/3 System. The data in the CC1TEV table is read during a subsequent posting of time events, and then stored as time events in the TEVEN table.

#### **Download:**

The download supplies the time recording system with data from the SAP R/3 System. Master data from the applications (such as HR master data) and control data (such as attendance and absence reasons, time event types) are supplied to the time recording system to be used for validation purposes. Because the time recording system is supplied with transaction data (time accounts), employees can then display their time account balances at terminals.



**Figure 20: Maintaining Time Data Using Infotypes**

You can also maintain and display time data using time infotypes. The following options are available for recording time data using infotypes:

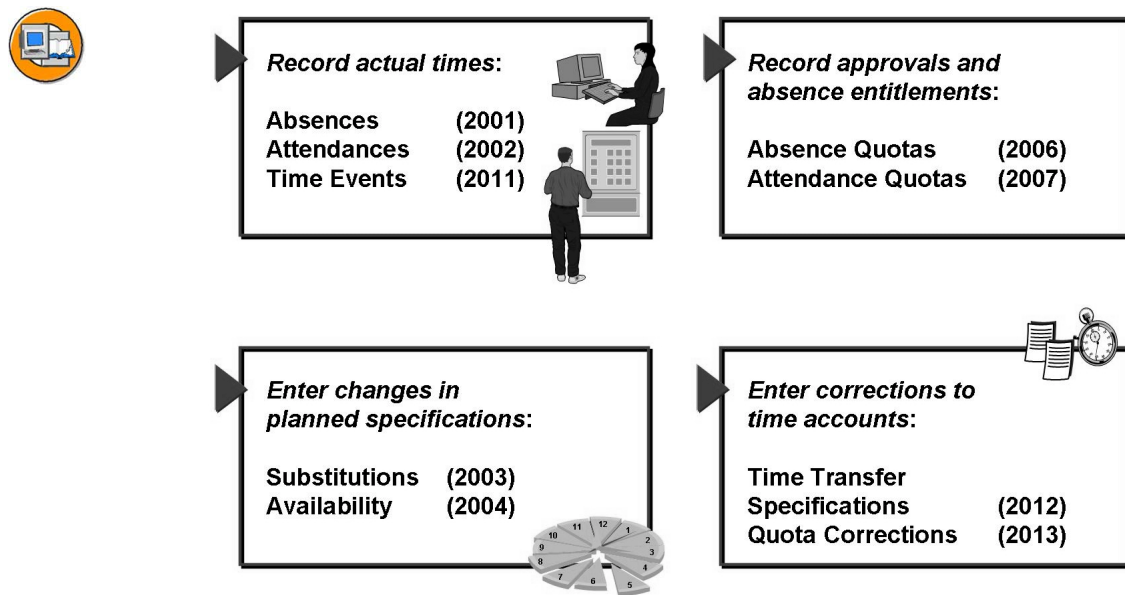
Single screen: Records one infotype for one employee

Fast entry: Records one infotype for several employees

List screen: Records several records of one infotype for one employee

Time infotypes are also subdivided into subtypes. For example, various forms of absences or absence types (such as illness with certificate, illness without certificate, leave, and so on) are recorded using subtypes of the *Absences* infotype (2001).

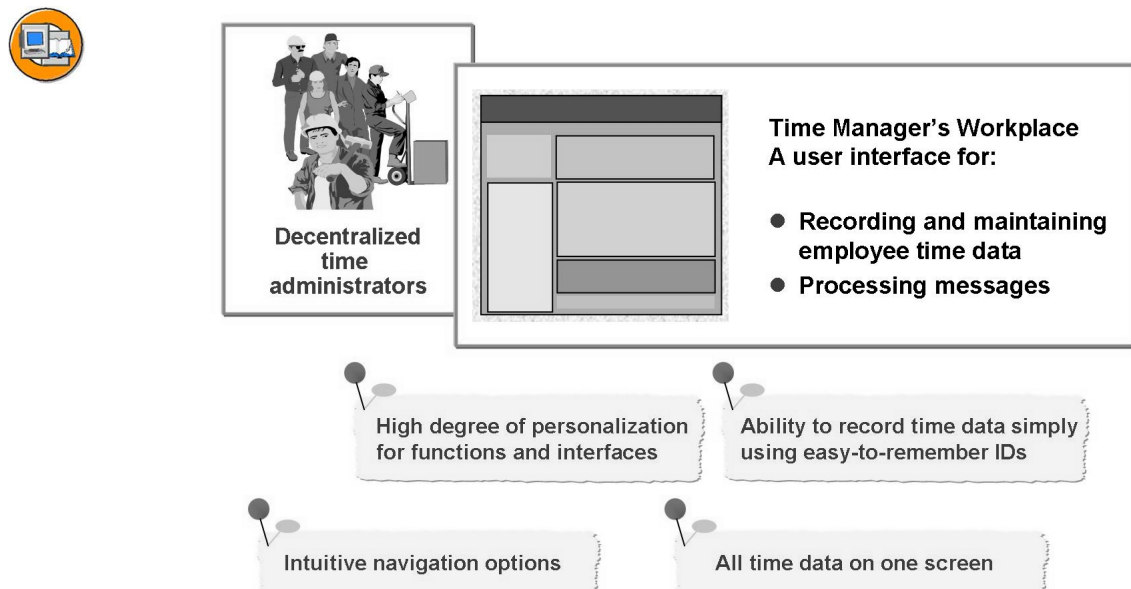
The Object Manager is available when you maintain time data (in transaction PA61) and display time data (transaction PA51), which you can use to search for employees for whom you want to display or process data. The Object Manager is divided into a search area and a selection area. Using search tools, you can search for objects to be displayed in the selection area.



**Figure 21: Overview of Time Infotypes**

The figure shows an overview of the time infotypes.

The time infotypes *Time Events (2011)*, *Time Transfer Specifications (2012)* and *Quota Corrections (2013)* are only relevant for time evaluation.



**Figure 22: Time Manager's Workplace**

The role of a decentralized time administrator is usually fulfilled by supervisors, foremen, administrative assistants, or secretaries in individual departments on site. These groups of employees maintain time data for a manageable number of other employees, in addition to their usual tasks.

For this reason, the *Time Manager's Workplace* (TMW) is easy to learn and extremely user-friendly.

Some advantages of using the TMW are:

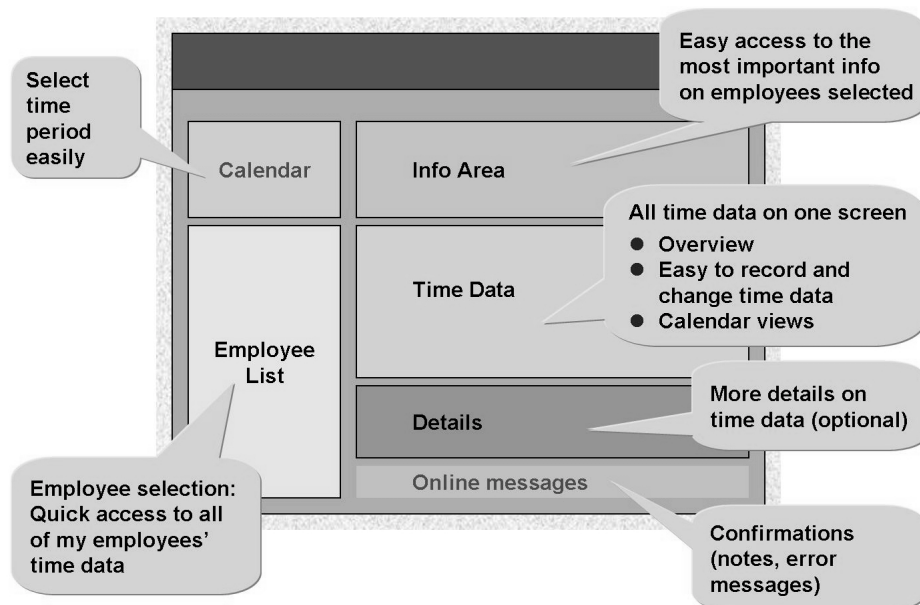
All time data can be entered, corrected, or supplemented on one screen

Intuitive navigation options

Time data is recorded using easily recognizable time data IDs

Time administrators can toggle between different views (multi-day, multi-person, one-day, and team view) to maintain time data.

The Time Manager's Workplace can be personalized, that is, you can customize the TMW to suit each user's tasks, with the applicable functions available.



**Figure 23: Layout and Screen Areas of the TMW**

The *Time Data Maintenance* and *Message Processing* tasks are delivered in the Time Manager's Workplace in the standard system. The layout of screen areas is displayed in the figure above for the Time Data Maintenance task. The layout is similar for the Message Processing task.

The Calendar is used to select the time period for which time data is to be entered.

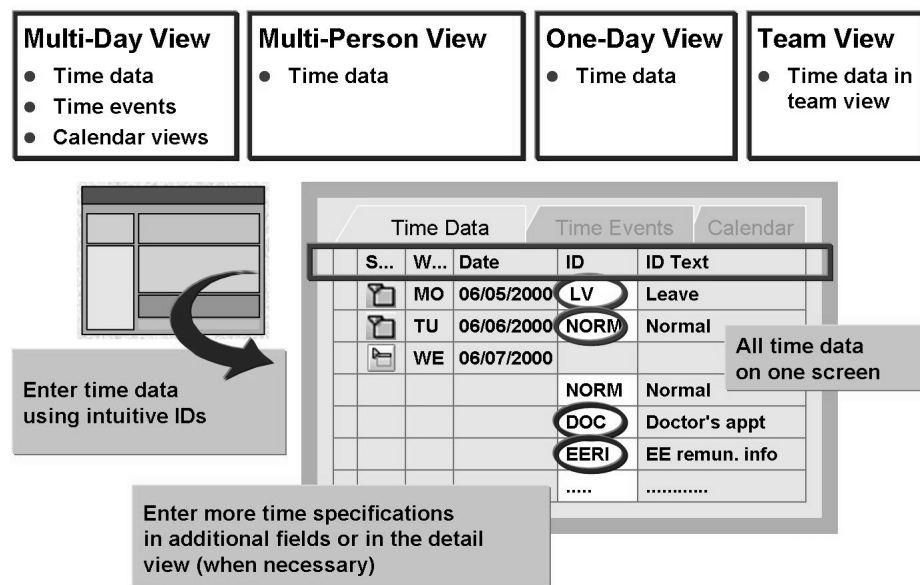
The Employee List contains the employees assigned to the time administrator. Time administrators can select the employee or employees from this list for whom they want to enter or change time data.

They can display additional information for any selected employee in the Info Area (such as details on master data or time accounts).

In the Time Data screen area, you enter and maintain time data using intuitive time data IDs (such as "I" for illness or "L" for leave).

Any additional specification for the time data can be entered in the Details area (such as activity allocation specifications for an attendance), if required. Information on time data recorded is also visible in the Details area (person who entered the data, date on which data was entered, and so on).

The Messages area contains any messages or confirmations concerning time data entered by the time administrators. These messages can be informational, warning, or error messages.



**Figure 24: Recording Time Data**

The Time Data area enables time administrators to maintain all time data for their employees without having to switch to different screens. They can choose from various views (multi-day, multi-person, and one-day view).

In the Time Events tab, time administrators can maintain and add to employees' time events. This tab is only available in the Multi-Day View. From the Time Data tab, which is available in all of the views, you can enter and maintain all other types of time data (such as attendances and absences, changes in planned specifications, and so on).



New **calendar views** and a **team view** are available as of R/3 Enterprise.

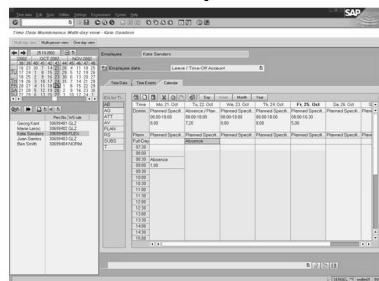
Time data is entered using intuitive time data IDs. This significantly reduces the administrative workload of time administrators. For example, you could enter "ILL" to create an illness record.

Time data can be supplemented by information entered in additional fields in the Time Data or Details areas.

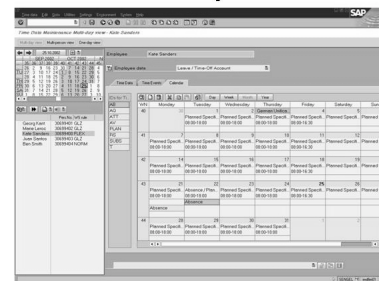
In the Time Data area, dominants are used to represent the most important information that applies to each day. The focus is on the employee's availability. If you collapse the time data for a specific day, only the dominant information for that day is displayed.



TMW weekly calendar



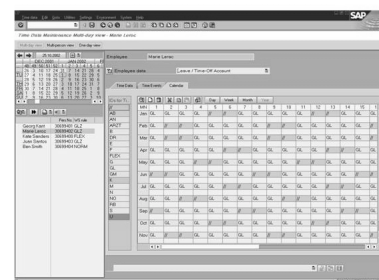
TMW monthly calendar



- Three new calendar views have been added to the Time Data area of the Multi-Person View

**New in Enterprise**

TMW annual calendar



**Figure 25: TMW calendar views**

The calendar view is new in the time data maintenance area of the TMW. It provides a graphical overview of a person's time data (time entries and time events). A daily, weekly, monthly, and annual calendar are available, which enables you to gain a quick overview of a specific period.

The use of colors for the time data IDs enables you to quickly differentiate different types of time data.

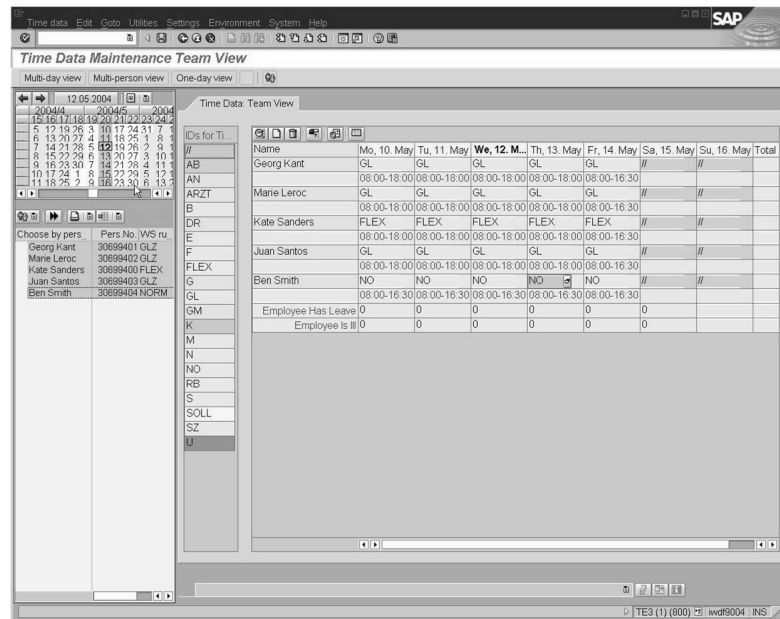
You can also maintain data in this view. The color-coded time data IDs are displayed in a bar to the left of the calendar. You can drag and drop them to the required days. If required, you can copy and paste the calendar entries, such as recurring attendances or absences.

Because they work in a similar way to well-known PC applications (such as Microsoft Outlook), the calendars are very easy to handle.



The new calendar views are part of the standard delivery for R/3 Enterprise. They can also be implemented in Release 4.6C on a project basis. (See SAP Note 421014)

If you are interested, you can create a SAP OSS message under the PT-RC-UI-TMW component.



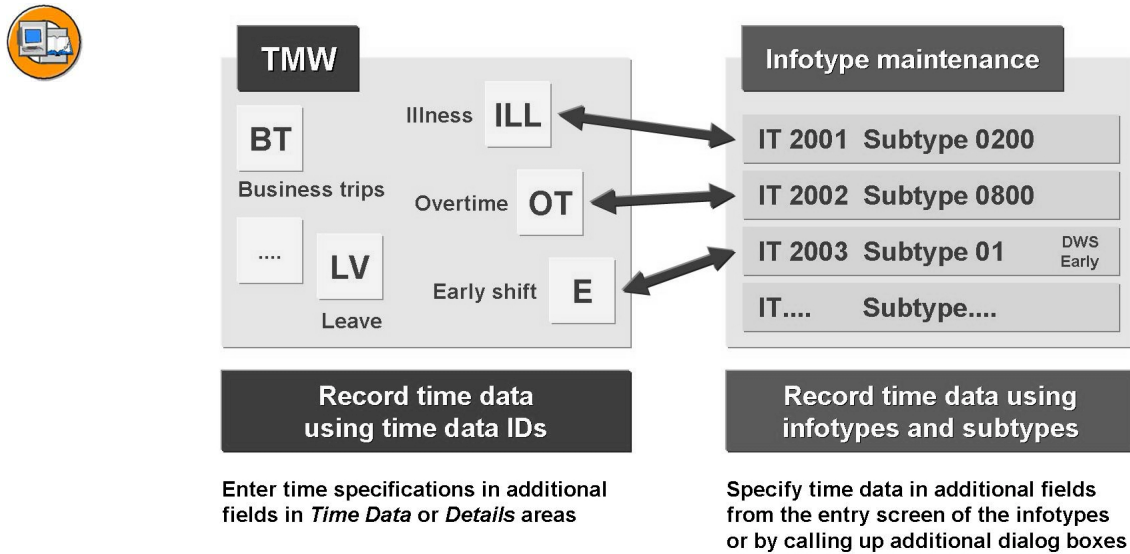
**Figure 26: Maintaining Time Data in the Team View**

The team view is new in the time data maintenance area of the TMW. The team view is a list-oriented color display of multiple employees' time data over a period of your choice. It provides an overview of the position and frequency of full-day and partial-day data for your entire team.

The team view is ideal for entering time data when you want a quick overview of full-day time data for your entire team. The different colors of the time data IDs enable you to note at a glance the position and frequency of the various shifts and to detect bottlenecks.

It is also suited to planning shifts and vacation for your team, since you have an overview of your team's full-day and multiple-day time data. To simplify the planning process, you can use a customer-specific Business Add-In (BAI) to define additional rows and columns for the information you require. In addition, you can define rows with evaluations such as the number of employees on vacation.

For your day-to-day planning needs, you can also define a customer-specific row with evaluations such as the number of employees off sick or a shift counter displaying the number of early, late, or night shifts, for example.



**Figure 27: Recording Time Data: Infotype Maintenance in the TMW**

The **Time Manager's Workplace (TMW)** provides an easy-to-use user interface for recording time data. Time data is recorded using intuitive time data IDs. The time data is still stored in the individual time infotypes.

IDs are defined in Customizing to represent each type of time data. For example, a time data ID such as "OT" can be defined for an attendance type to be valued with an overtime compensation type (such as basic pay for time off) in time evaluation. The time data ID is assigned to the *Attendances* infotype (2002) and subtype for this attendance type in Customizing. In addition, the overtime compensation type is also specified for the time data ID.

Time data entered in the TMW using time data IDs can be processed in the *Time Data Maintenance* transaction and vice versa.

Time data IDs can also be generic if corresponding subtypes are not specified. If time administrators use a generic ID for time data, then they are advised to specify more detailed information in the *Details* area.

## Exercise 1: Time Data Recording

### Exercise Objectives

After completing this exercise, you will be able to:

- Enter time data using the Time Manager's Workplace and by maintaining infotypes

### Business Example

Employees at your enterprise work according to the times specified in their work schedules. However, deviations can occur. Employees call in sick, go on vacations, fill in for other employees, work overtime, and so on.

### Task 1:



**Hint:** Use the following personnel number for this exercise:

306993## Jane Miller (Salaried employee)

where ## = your group number

Entering and Maintaining Time Data Using the *Time Manager's Workplace*

1. Access the *Time Manager's Workplace*. For this part of the exercise, you will be working in the **Time Data** area.
2. Temporarily add your employee Jane Miller to the employee list.
3. Jane Miller (306993##) has requested 3 days of leave. Enter a leave record for a three-day period in the previous month. Use the time data ID **L**.
4. Jane also has a one-day business trip this month. Use the time data ID **BT**.
5. Enter a partial-day absence for a doctor's appointment on Monday of next week from 1:00 p.m. to 3:00 p.m. Use the time data ID **DOC**.

### Task 2:

Check your entries in the *Calendar* area

1. Switch from the *Time Data* tab page to the *Calendar* tab page. The data is displayed graphically. Check your entries for Jane Miller in the monthly view. Choose the period as usual in the calendar in the top left screen area.
2. **Find out the date of Easter Monday this year**

*Continued on next page*

One of your employees would like to take a day off on the Tuesday following Easter Monday this year. In the monthly calendar view, find out when Easter is this year and therefore the date that the employee wants to take off.

3. **Check your entries in the infotype maintenance function**

Access the infotype maintenance function from the SAP Easy Access Menu (or choose transaction PA61).

Check whether the data you saved in the TMW has arrived correctly.

### **Task 3: Optional Exercise: Enter Time Data by Maintaining Infotypes**

Enter similar time data to that detailed above by maintaining the appropriate infotypes.

1. Access infotype maintenance.
2. Enter a three-day leave record using the *Absences* infotype (2001), subtype *0100*.
3. Enter a one-day business trip using the *Attendances* infotype (2002), subtype *0400*.
4. Enter a partial-day doctor's appointment (from 1:00 p.m. to 3:00 p.m.) using the *Absences* infotype (2001), subtype *0230*.

## Solution 1: Time Data Recording

### Task 1:



**Hint:** Use the following personnel number for this exercise:

306993## Jane Miller (Salaried employee)

where ## = your group number

Entering and Maintaining Time Data Using the *Time Manager's Workplace*

1. Access the *Time Manager's Workplace*. For this part of the exercise, you will be working in the **Time Data** area.
  - a) **Accessing the Time Manager's Workplace**

To access the *Time Manager's Workplace*, choose *Human Resources* → *Time Management* → *Administration* → *Time Manager's Workplace*.
2. Temporarily add your employee Jane Miller to the employee list.
  - a) **Temporarily add an employee to the employee list**

To add Jane Miller (personnel number 306993##) temporarily to the employee list, click on the *Employee List* button in the *Employee List* screen area, and choose *Temporarily insert employee*.

Enter the personnel number of your employee *Jane Miller*, 306993## (## = your group number), and then choose *Enter*.
3. Jane Miller (306993##) has requested 3 days of leave. Enter a leave record for a three-day period in the previous month. Use the time data ID **L**.
  - a) **Create a leave record for a period of several days**

To enter time data for Jane Miller, double-click to select her name from the list.

In the *Time Data* area, choose *Create details* (second button from the left).

Enter time data ID **L** in the *Details* area and an applicable time period of three days in the *Date* field.

(You will notice that the system closes a leave record and starts a new one each time you choose *Enter*.)

If you enter a period that is not within the selected period in the calendar, a warning appears. Choose *Enter* to confirm the message, and save your entries.

*Continued on next page*

4. Jane also has a one-day business trip this month. Use the time data ID **BT**.

a) **Create a one-day business trip**

Choose a selection period in the calendar during which you want to record the one-day business trip and the partial-day doctor's appointment.

Overwrite the day dominant of a workday with the time data ID **BT** in the ID field of the *Time Data* screen area.

Save your entries.

5. Enter a partial-day absence for a doctor's appointment on Monday of next week from 1:00 p.m. to 3:00 p.m. Use the time data ID **DOC**.

a) **Create a partial-day doctor's appointment**

Overwrite the day dominant of a workday with the time data ID **DOC** in the ID field of the *Time Data* screen area. Enter 13:00 as the start time and 15:00 as the end time. Choose *Enter* to confirm your entries. The partial-day doctor's appointment automatically appears in a separate row.

Save your entries.

## Task 2:

Check your entries in the *Calendar* area

1. Switch from the *Time Data* tab page to the *Calendar* tab page. The data is displayed graphically. Check your entries for Jane Miller in the monthly view. Choose the period as usual in the calendar in the top left screen area.

- a) You should see the leave, business trip, and doctor's appointment you entered in this view too.

2. **Find out the date of Easter Monday this year**

One of your employees would like to take a day off on the Tuesday following Easter Monday this year. In the monthly calendar view, find out when Easter is this year and therefore the date that the employee wants to take off.

- a) Select the relevant month in the calendar in the top left screen area.

Choose the monthly view in the calendar.

In the monthly and weekly view, public holidays are displayed in place of the date.

3. **Check your entries in the infotype maintenance function**

Access the infotype maintenance function from the SAP Easy Access Menu (or choose transaction PA61).

*Continued on next page*

Check whether the data you saved in the TMW has arrived correctly.

- a) Open a new session, and go to the infotype maintenance transaction. We recommend the *Time Data Maintenance* transaction (PA61). Alternatively, you can work in Master Data Maintenance (transaction PA30).

Ensure that the doctor's appointment and leave has been created correctly for personnel number 306993## in the *Absences* infotype (2001).

The business trip you entered is located in the *Attendances* infotype (2002).

### Task 3: Optional Exercise: Enter Time Data by Maintaining Infotypes

Enter similar time data to that detailed above by maintaining the appropriate infotypes.

1. Access infotype maintenance.

- a) **Call time data maintenance**

Choose *Human Resources* → *Time Management* → *Administration* → *Time Data* → *Maintain*.

In the *Personnel number* field, enter the personnel number of your employee: 306993## (## = your group number).

2. Enter a three-day leave record using the *Absences* infotype (2001), subtype 0100.

- a) **Create a leave record for a period of several days**

Enter the time period in the *Period* field.

Enter 2001 (Absences) in the *Infotype* field and enter absence type 0100 (Leave) in the *STy* (Subtype) field.

Choose the *Create* button, or *Edit* → *Create* from the menu.

Save your entries. The *Maintain Time Data* screen appears again.

*Continued on next page*

3. Enter a one-day business trip using the *Attendances* infotype (2002), subtype *0400*.
  - a) **Create a one-day business trip**

Access the initial screen for time data maintenance.

Enter the time period in the *Period* field.

Enter *2002* (Attendances) in the *Infotype* field and enter attendance type *0400* (Business trip) in the *STy* (subtype) field.

Choose the *Create* button, or *Edit* → *Create* from the menu.

Save your entries. The *Maintain Time Data* screen appears again.
4. Enter a partial-day doctor's appointment (from 1:00 p.m. to 3:00 p.m.) using the *Absences* infotype (2001), subtype *0230*.
  - a) **Create a partial-day absence (doctor's appointment)**

Access the initial screen for time data maintenance.

Enter the time period in the *Period* field.

Enter *2001* (Absences) in the *Infotype* field and enter absence type *0230* (Partial-day doctor's appointment) in the *STy* (subtype) field. In the following screen, enter 13:00 to 15:00 in the *Time* field.

Choose the *Create* button, or *Edit* → *Create* from the menu.

Save your entries. The *Maintain Time Data* screen appears again.





## Lesson Summary

You should now be able to:

- Name the various options for time recording



## Unit Summary

You should now be able to:

- Describe the roles in Time Management
- Name the various options for time recording



## Test Your Knowledge

1. Time data is best maintained in the SAP system centrally by one administrator.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

2. Which of the following options for recording time data are available in the SAP system?

*Choose the correct answer(s).*

- ☐ A Self-service
- ☐ B Infotype maintenance
- ☐ C Flextime sheet
- ☐ D Time Manager's Workplace
- ☐ E Clock in/out using WAP cellular phone



## Answers

1. Time data is best maintained in the SAP system centrally by one administrator.

**Answer:** False

The SAP role concept supports both centralized and decentralized scenarios for administering time data. This also enables various administrators to process the same time data from different perspectives.

2. Which of the following options for recording time data are available in the SAP system?

**Answer:** A, B, D, E

The SAP system provides various options for recording time data. Only the answer "flextime sheet" is not available in the standard system.

# Unit 3

## Enterprise Structure and Groupings

### Unit Overview

Using our business scenario as an example, you will learn how the personnel and enterprise structures are mapped in the SAP R/3 System.



### Unit Objectives

After completing this unit, you will be able to:

- Describe the levels in the personnel and enterprise structures
- Explain the purpose of personnel subarea groupings and employee subgroup groupings in Time Management

### Unit Contents

Lesson: Enterprise Structure and Groupings .....	48
Exercise 2: Organizational Reassignment .....	59

## Lesson: Enterprise Structure and Groupings

### Lesson Overview

This lesson describes the personnel and enterprise structures and explains the concept behind groupings of personnel subareas and employee subgroups.



### Lesson Objectives

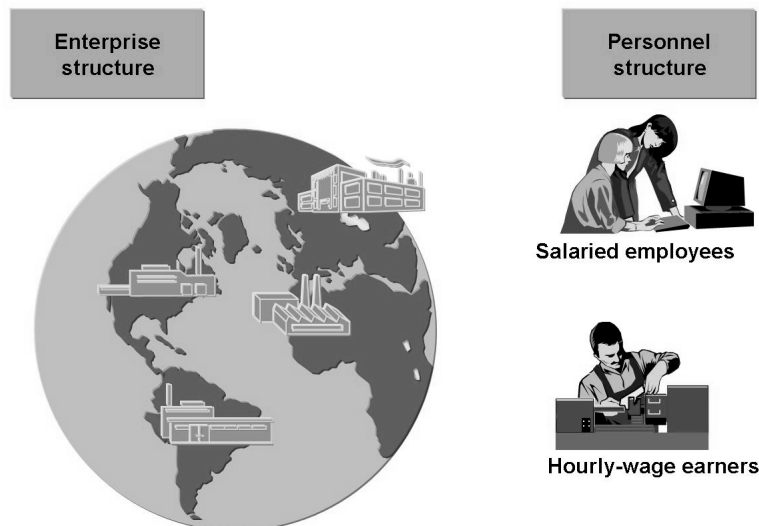
After completing this lesson, you will be able to:

- Describe the levels in the personnel and enterprise structures
- Explain the purpose of personnel subarea groupings and employee subgroup groupings in Time Management

### Business Example

- Using our business scenario as an example, you will learn how the personnel and enterprise structures are mapped in the SAP system.
- Our enterprise uses groupings to differentiate between various elements in Time Management. You will become familiar with the concept.

### Enterprise Structure

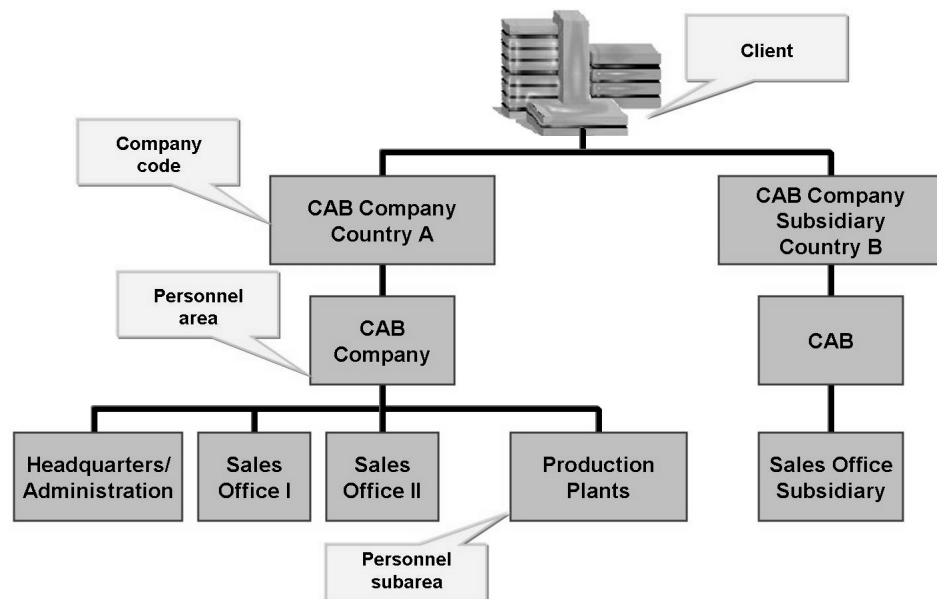


**Figure 28: Overview of Enterprise and Personnel Structures**

Each employee must be uniquely categorized to fit into enterprise and personnel structures. In other words, the employee works in a certain area (at Sales Office I, for example), and has a certain status (such as salaried employee or hourly-wage earner).

Categorizing an employee to fit into the enterprise and personnel structures takes place in the employee's master data record in the *Organizational Assignment* infotype (0001). The *Organizational Assignment* infotype must be created for every employee.

You set up the enterprise and personnel structures in the system by completing the Customizing steps in the Implementation Guide (IMG).



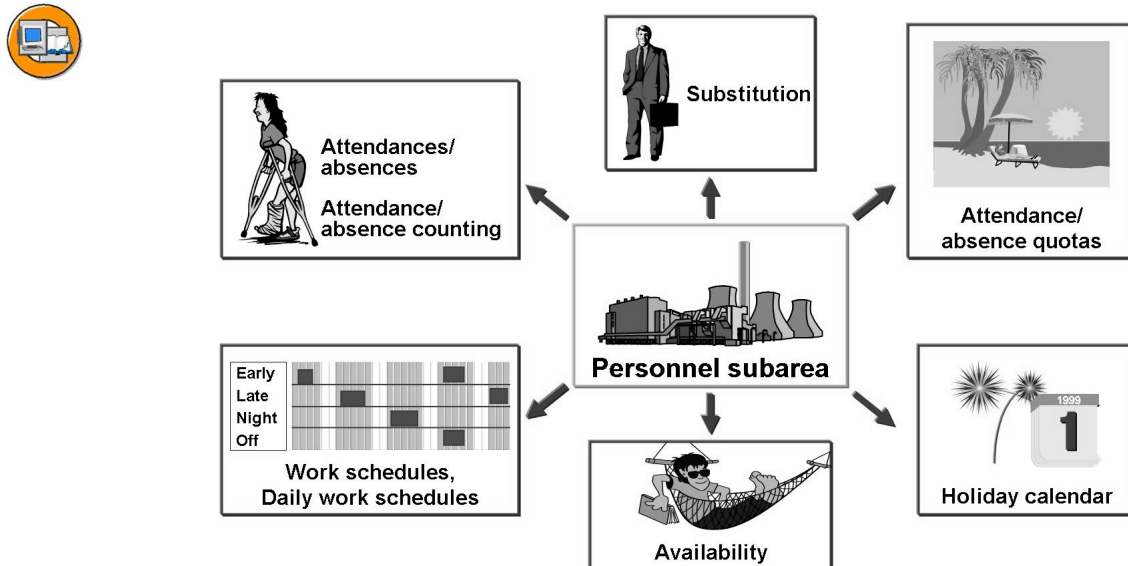
**Figure 29: Example of an Enterprise Structure**

The enterprise structure for personnel administration is determined by the following elements:

- Client
- Company code
- Personnel area
- Personnel subarea

The client can apply to a company code right through to the entire corporation. The company code is defined in Accounting. The balance of accounts required by law and the profit and loss statements are created on the company code level. The personnel area, used exclusively in personnel administration, is unique within the client. Each personnel area must be assigned to a company code. The last element in the enterprise structure is the personnel subarea, which is also used exclusively by personnel administration. The groupings that determine which settings can be used for an employee of a certain company code/personnel area are linked to the personnel subarea.

This graphic shows the enterprise structure of the CAB Company as an example of an enterprise structure represented in the SAP R/3 System.

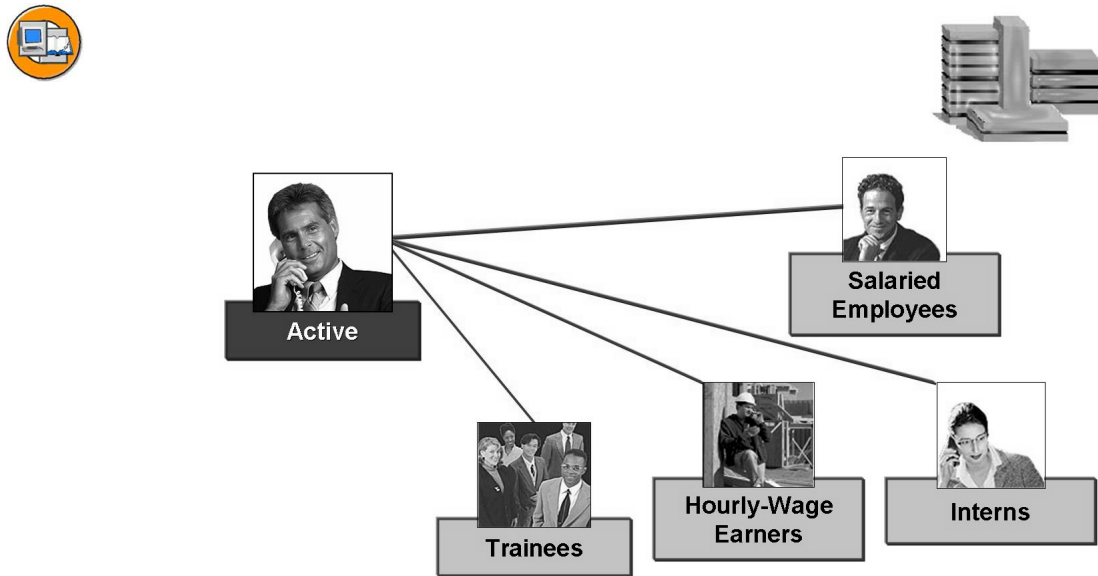


**Figure 30: Personnel Subareas: Control Indicators**

The control indicators determined by the personnel subarea for Time Management are:

- Assignment of a public holiday calendar to a personnel subarea
- Personnel subarea groupings for:
- Work schedule
- Attendance and absence types
- Substitution types and availability types
- Attendance and absence counting
- Time quotas
- Time recording





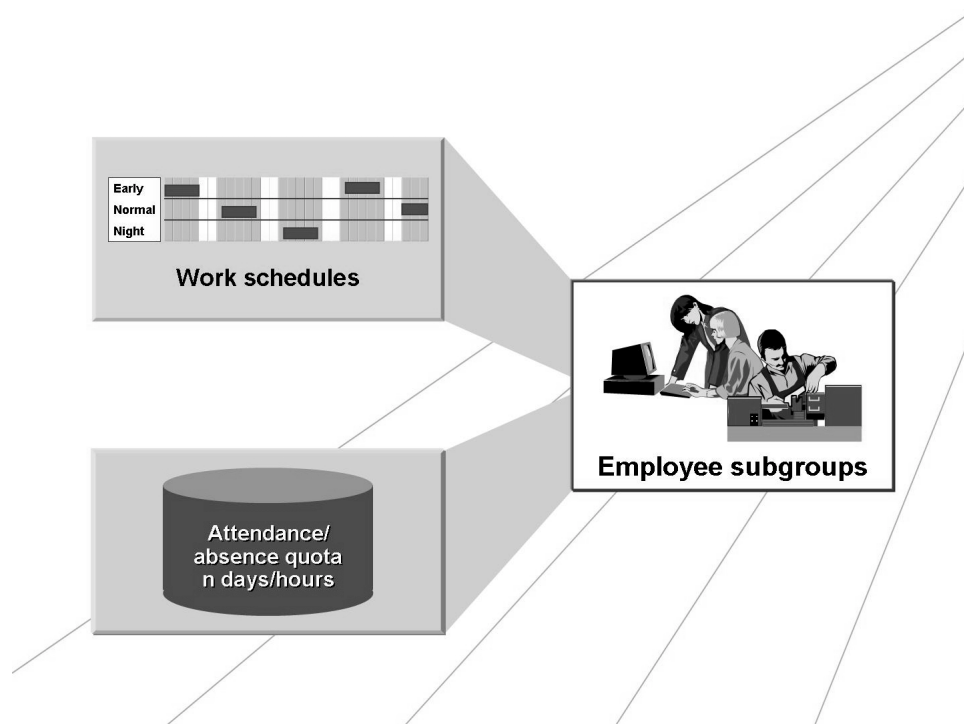
**Figure 31: Example of a Personnel Structure**

An employee group divides employees according to their working relationship in the enterprise (active, pensioner, early retiree, and so on).

An employee subgroup is a more specific division of the employee group based on employee status (salaried employees and hourly-wage earners are subgroups of the "Active" employee group).

All control features of the personnel structure are defined at the employee subgroup level.

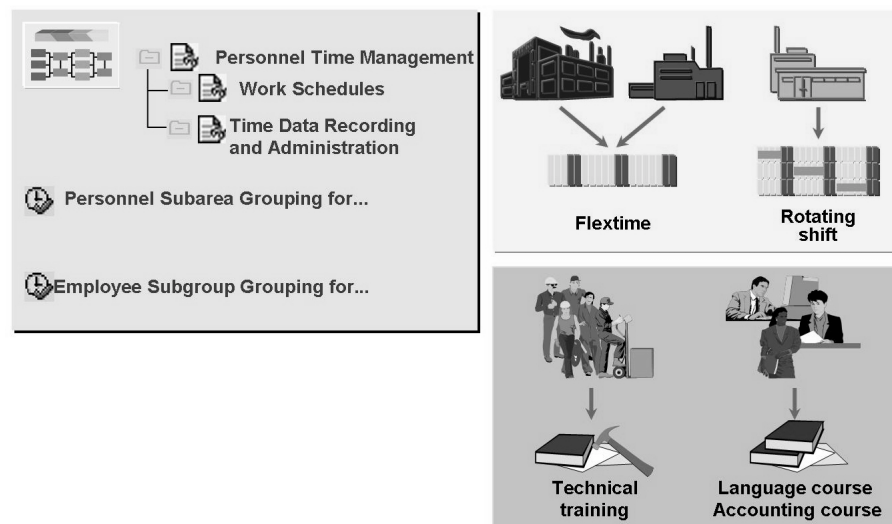
The graphic above displays part of the personnel structure in place at the CAB Company.



**Figure 32: Employee Subgroups: Control Indicators**

The control indicators determined by the employee subgroup for Time Management are:

- Employee subgroup grouping for work schedules
- Employee subgroup grouping for time quotas



**Figure 33: Groupings to Represent Differences and Similarities**

Similarities and differences between personnel subareas or between employee subgroups based on their time management aspects are represented by groupings in the system.

The basic principle of the groupings is that all personnel subareas that are handled in the same way for one time management aspect (for example, they have the same work schedules) are assigned to a grouping. If any time management aspect is different among the personnel subareas, then these personnel subarea is assigned to different groupings.

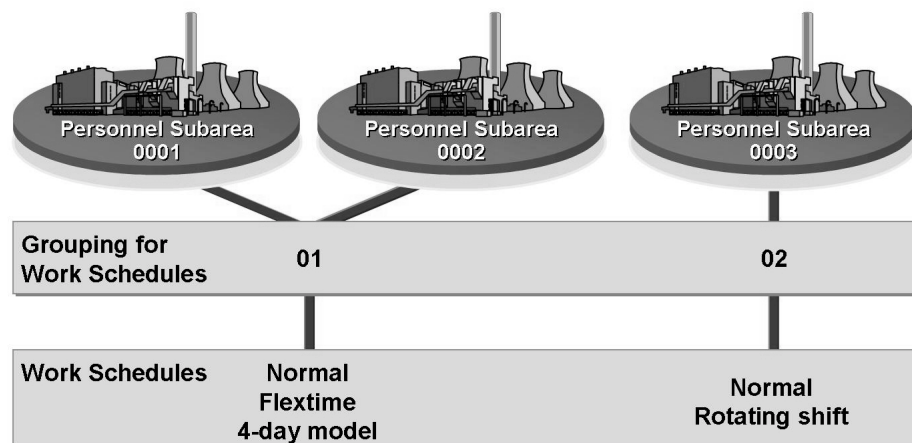
By grouping personnel subareas, you can reduce the amount of time and effort spent on maintenance. (The permitted work schedules only need to be stored once for a grouping of personnel subareas, for example). In addition, you can control permissions on the basis of groupings. For example, the only work schedules permitted for a personnel area are those of the grouping to which the personnel subarea is assigned.

The same applies to employee subgroup groupings.

Groupings are assigned at various points in the IMG for Personnel Time Management.

**Note:**

Groupings are used not only in Time Management, but also in other SAP R/3 components, such as Personnel Administration and Payroll.



**Figure 34: Example: Personnel Subarea Grouping for Work Schedules**

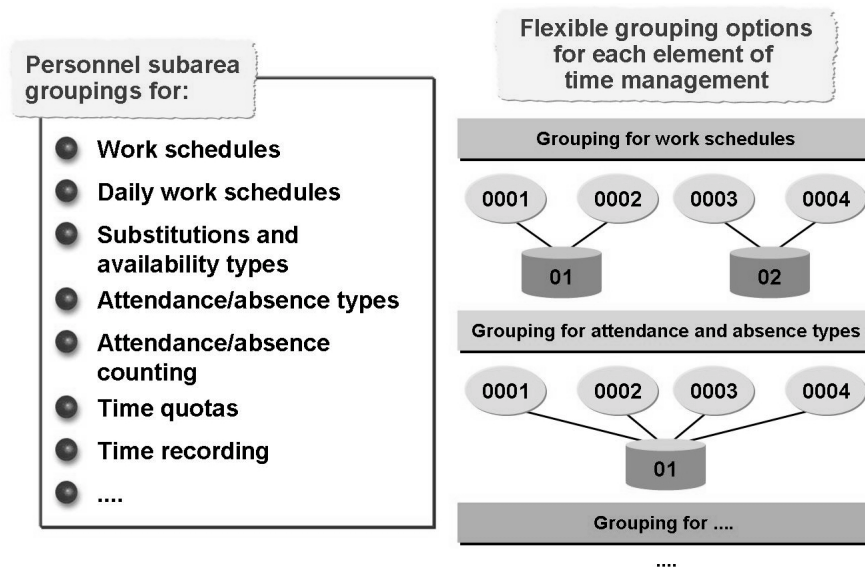
A personnel subarea grouping for work schedules is a group of personnel subareas to which the same work schedule rules apply. This grouping allows you to control whether a work schedule is permitted within the personnel subareas.

Personnel subareas for which the same work schedule rules are valid have the same grouping. Several groupings are required, however, if different work schedule rules apply to different personnel subareas.

Work schedule rules assigned to different groupings may have the same name.

#### Example:

Employees in your personnel subareas **0001** and **0002** work according to the Normal, Flextime, and the 4-Day working time models. Employees in your personnel subarea **0003** work according to the Normal and Rotating Shift working time models. The work schedules valid for personnel subareas **0001** and **0002** are not permitted in personnel subarea grouping **0003**. The work schedules valid for personnel subarea **0003** are not permitted for personnel subareas **0001** and **0002**.



**Figure 35: Additional Personnel Subarea Groupings**

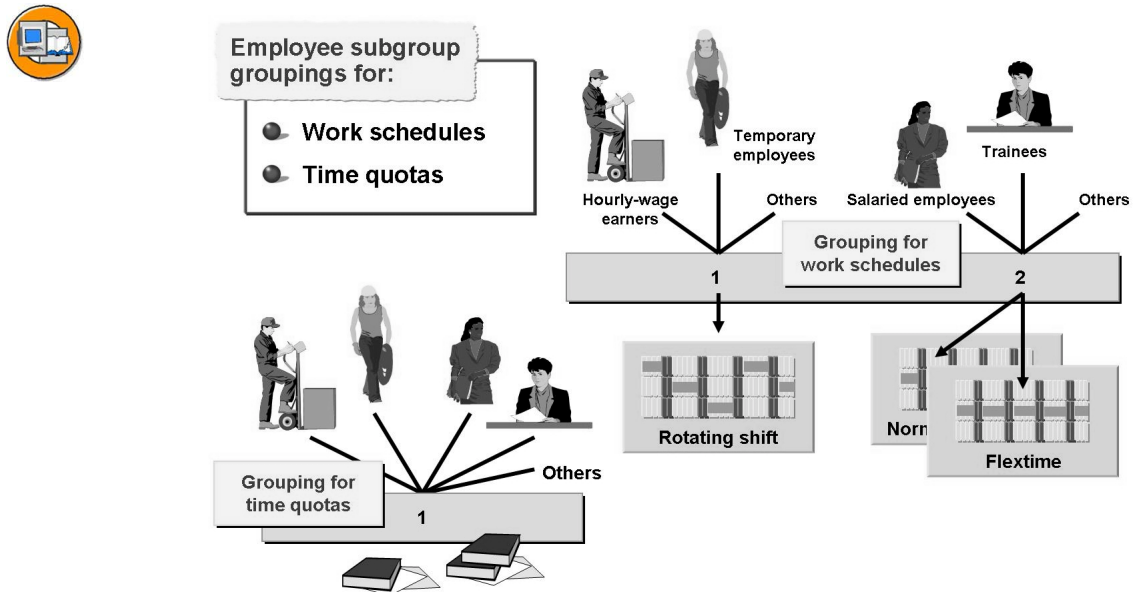
Personnel subareas can be regrouped for different time management aspects. Groupings are only based on one individual time management aspect and remain independent from each other.

#### Example:

The same work schedules are valid for both personnel subareas **0001** and **0002**. Different work schedules are valid for the personnel subareas **0003** and **0004**. Personnel subareas **0001** and **0002** are therefore assigned to grouping **01** for work schedules, and personnel subareas **0003** and **0004** are assigned to grouping **02**.

You do not, however, want to differentiate between personnel areas regarding the attendance and absence types: All attendance and absence types are permitted for the employees in all personnel subareas. For this reason, all personnel subareas are assigned to only one grouping, **01**, which contains all of the attendance and absence types that apply in the enterprise.

You can decide whether you need to distinguish between personnel subareas for the other groupings.



**Figure 36: Employee Subgroup Groupings**

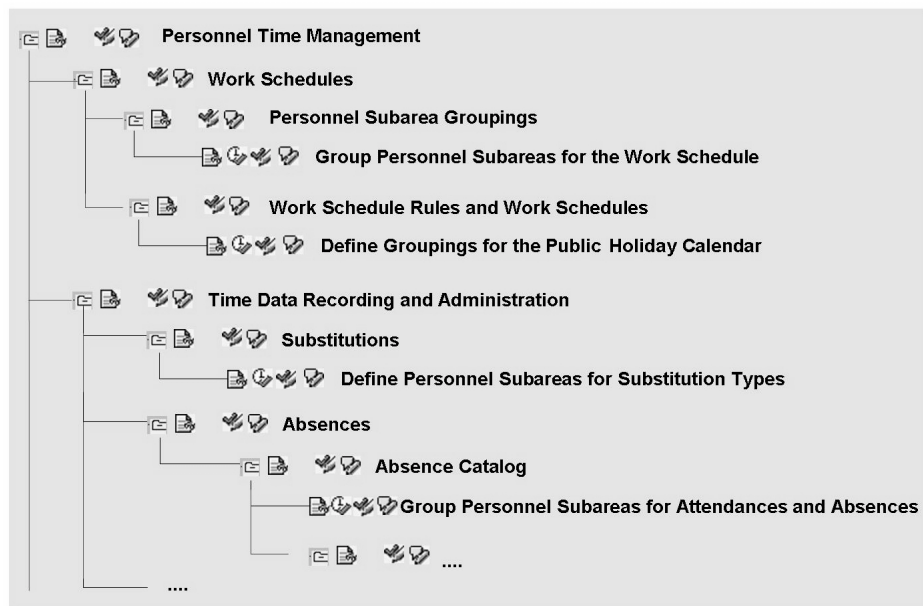
The same principle that applies to personnel subarea groupings for certain time management aspects (such as work schedules, time quotas) also applies to employee subgroup groupings.

In this way, work schedules can also be defined for various groupings of employee subgroups. To do so, you define employee subgroup groupings for work schedules. The standard system already contains the groupings **1** (hourly-wage earners) and **2** (salaried employees). The groupings required are assigned to the individual employee subgroups.

#### Example:

If the work schedules for hourly-wage earners and salaried employees differ, and certain work schedules are only permitted for salaried employees and not for hourly-wage earners (and vice versa), then you set up one grouping for salaried employees and one for hourly-wage earners. If there are no differences for these employee subgroups, then one grouping is sufficient.

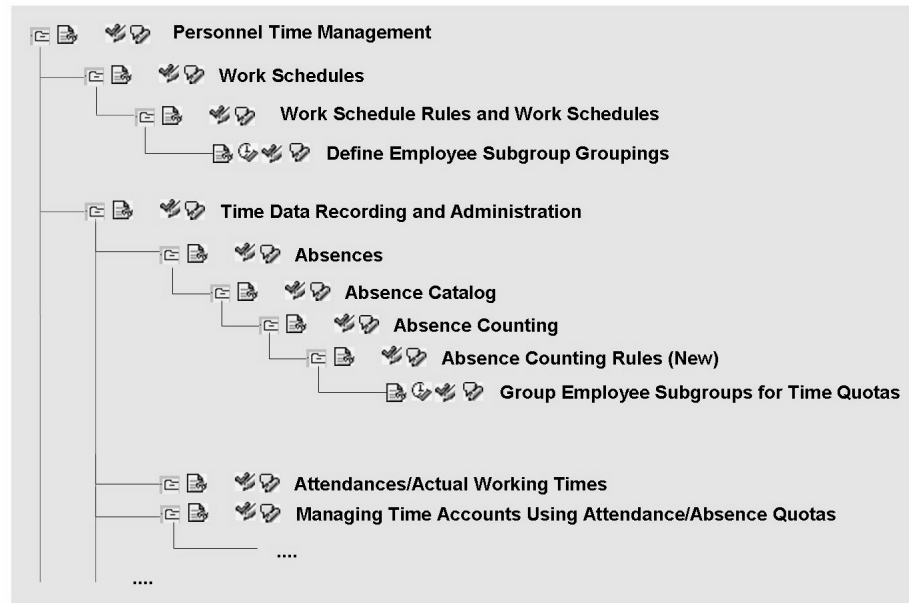
Employee subgroup groupings can also be set up for time quotas (absence entitlements, attendance approvals). In the standard system, time quotas are handled in the same way for all employee subgroups. The value **1** is assigned as the grouping for time quotas to all of the employee subgroups.



**Figure 37: Personnel Subarea: Customizing Steps**

The IMG contains an overview of all groupings in time management. You first have to generate a project for Personnel Time Management or a project that at least contains the Time Management component. Using this project, you can generate a view for steps required for personnel subareas and a view for the steps required for employee subgroups. In this way, you get a comprehensive overview of the groupings and assignments to be made.

You can check and assign the indicators determined for time management by the personnel subarea in a view containing the Customizing steps for personnel subareas. This is displayed in the figure above.



**Figure 38: Employee Subgroups: Customizing Steps**

You can check and assign the indicators determined for time management by the employee subgroups in a view containing the Customizing steps for employee subgroups. This is displayed in the figure above.





## Exercise 2: Organizational Reassignment

### Exercise Objectives

After completing this exercise, you will be able to:

- You carry out the personnel actions required for an organizational reassignment.

### Business Example

Your employees undergo an organizational reassignment.

As of January 1 of the current year, they are assigned to a different personnel subarea (Production). You carry out the appropriate steps.

### Task:

Organizational Reassignment

1. Carry out the *Organizational Reassignment* personnel action for your employees Karin Anderson and Tom Johnson starting from January 1 of the current year.

Assign the personnel subarea *TP##*. Enter data for the subsequent infotypes as follows:

Hourly-wage earner: Tom Johnson (Personnel number: 306991##)

Salaried employee: Karin Anderson (Personnel number: 306992##)

## = your group number

## Solution 2: Organizational Reassignment

### Task:

#### Organizational Reassignment

1. Carry out the *Organizational Reassignment* personnel action for your employees Karin Anderson and Tom Johnson starting from January 1 of the current year.

Assign the personnel subarea *TP##*. Enter data for the subsequent infotypes as follows:

Hourly-wage earner: Tom Johnson (Personnel number: 306991##)

Salaried employee: Karin Anderson (Personnel number: 306992##)

## = your group number

- a) Choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.

In the *Personnel number* field, enter the personnel number of the applicable employee (306992## for your salaried employee, for example). Then, enter the start date for the organizational reassignment in the *From* field (*January 1 of the current year*).

Select the action type *Organizational reassignment* and choose *Execute*, or from the menu, choose *HR Master Data* → *Execute*.

Save the subsequent *Actions* infotype (0000). Choose *Enter* to confirm the warning that appears.

In the subsequent *Organizational Assignment* infotype (0001), enter the personnel subarea *TP##* (## = your group number) in the *Personnel subarea* field and then save your entries.

You do not need to make any entries in the subsequent infotypes. Skip them by choosing the *Next record* button, or *Goto* → *Next record* from the menu.

Confirm the warning messages by choosing *Enter*.

Carry out this personnel action for both employees (personnel numbers 306991## and 306992##).



## Lesson Summary

You should now be able to:

- Describe the levels in the personnel and enterprise structures
- Explain the purpose of personnel subarea groupings and employee subgroup groupings in Time Management



## Unit Summary

You should now be able to:

- Describe the levels in the personnel and enterprise structures
- Explain the purpose of personnel subarea groupings and employee subgroup groupings in Time Management



## Test Your Knowledge

1. You can use the employee subgroup to specify control indicators for grouping work schedules.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False



## Answers

1. You can use the employee subgroup to specify control indicators for grouping work schedules.

**Answer:** True

You can use this grouping to, for example, divide work schedules that apply only to salaried employees or hourly-wage earners.

# Unit 4

## Work Schedules

### Unit Overview

This unit teaches you how to configure the public holiday calendar and work schedules.



### Unit Objectives

After completing this unit, you will be able to:

- Describe the characteristics of public holidays
- Describe the structure of the public holiday calendar
- Understand the relevance of public holidays for payment and attendance/absence counting
- Set up the individual elements of work schedules
- Generate and assign a work schedule

### Unit Contents

Lesson: Holiday Calendar .....	66
Lesson: Work Schedules .....	72
Exercise 3: Creating Work Schedules .....	91
Exercise 4: Creating Work Schedules (2) .....	105

## Lesson: Holiday Calendar

### Lesson Overview

This lesson deals with the public holiday calendar and its functions.



### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the characteristics of public holidays
- Describe the structure of the public holiday calendar
- Understand the relevance of public holidays for payment and attendance/absence counting

### Business Example

Employees at your company work according to various work time models. Full-time employees work flextime and rotating shifts. Part-time employees work patterns such as a four-day model. Prior to public holidays, some employees work a reduced schedule.

In this unit, you create the elements required to generate work schedules and you assign them to employees.

### Holiday Calendar

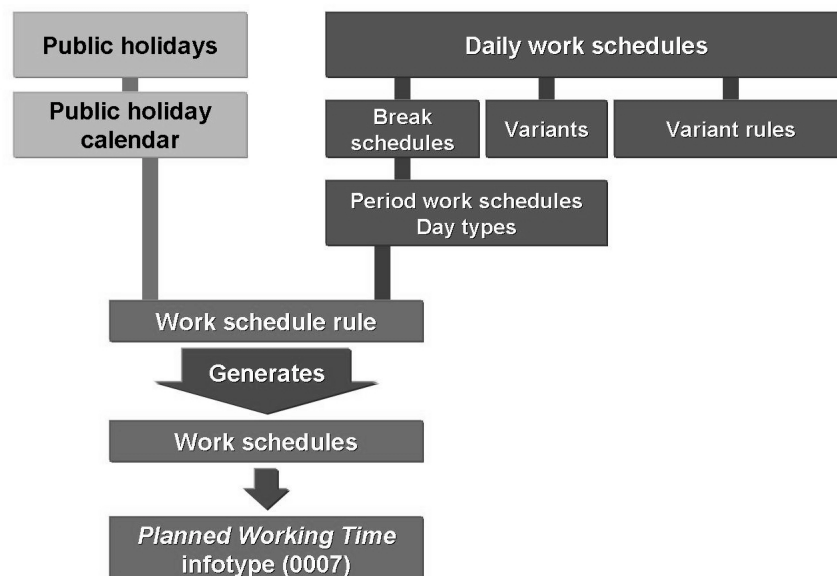


Figure 39: Creating Work Schedules: Customizing Steps

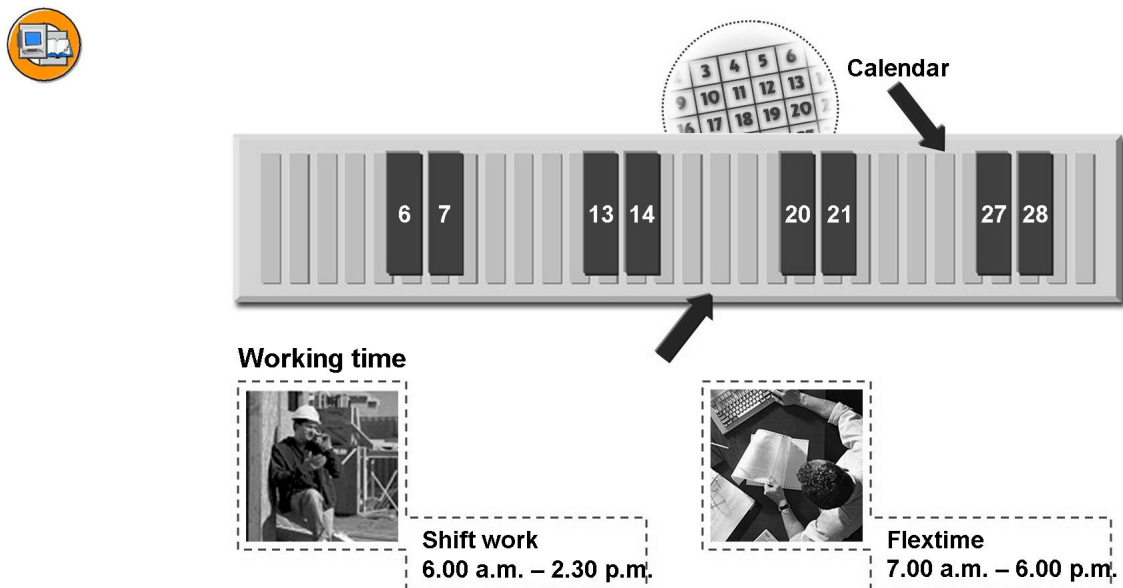


Prerequisites for SAP Time Management are a valid public holiday calendar with applicable public holidays and a valid work schedule.

A work schedule consists of a sequence of individual elements including a public calendar. After the individual elements are defined, they are combined in a work schedule rule, and a work schedule is then generated on the basis of the rule.

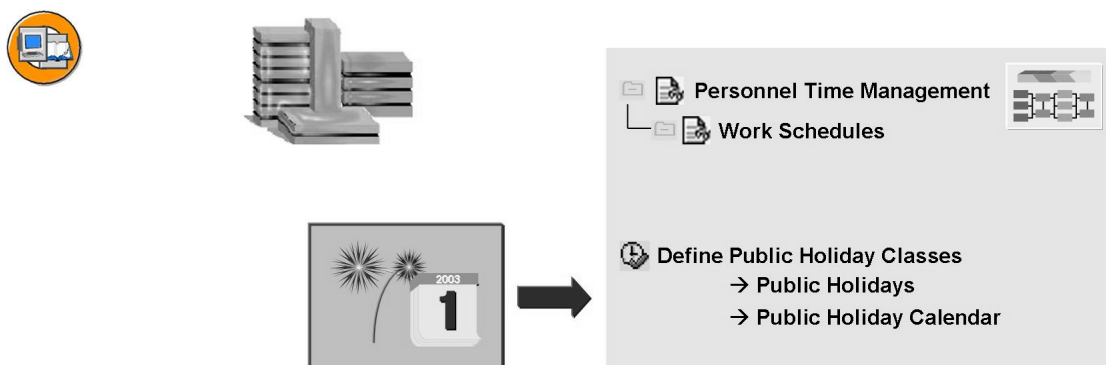
You carry out the necessary steps in Customizing.

A generated work schedule is assigned to employees in the *Planned Working Time* infotype (0007) using the work schedule rule.



**Figure 40: Work Schedules**

The central element in SAP Time Management is the employee's work schedule. The work schedule contains planned specifications of an employee's working time, including breaks. The work schedule is based on a valid public holiday calendar.

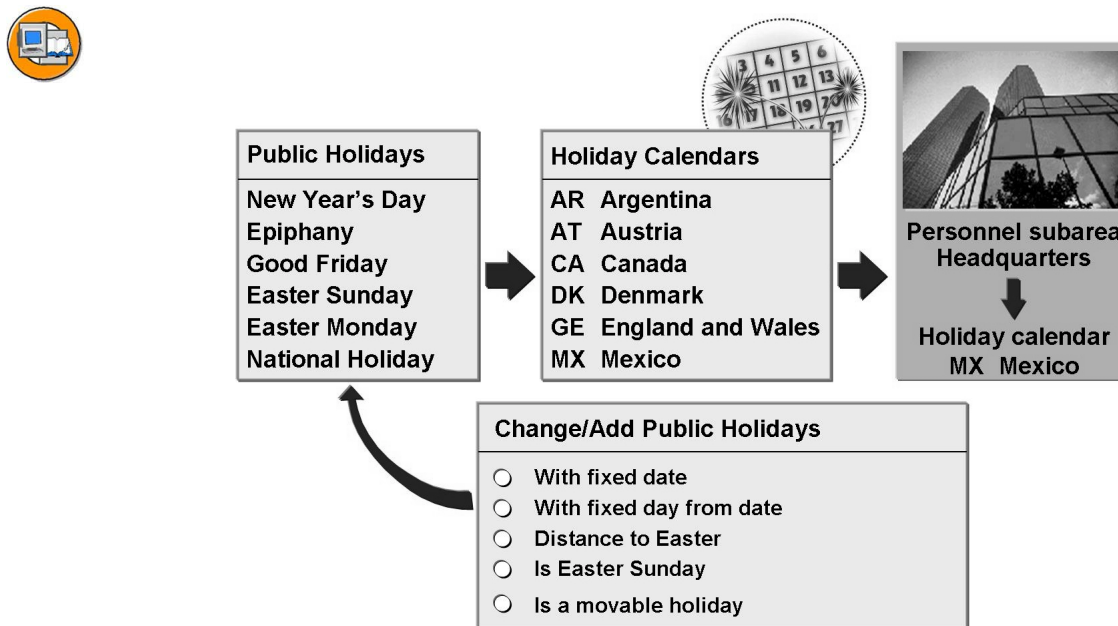


**Figure 41: Public Holidays and Public Holiday Calendar**

Different countries, regions, cities, and so on often have different public holidays. In Time Management, public holidays are grouped together in public holiday calendars. To set up a work schedule, you need a valid public holiday calendar including the applicable public holidays. The factory calendar is not significant.

Public holidays and public holiday calendars can be modified to suit regional and company-specific provisions.

You maintain public holidays and public holiday calendars under either *General Settings* or *Work Schedules* in the Implementation Guide (IMG) for Personnel Time Management.



**Figure 42: Holiday Calendar**

Every work schedule is based on a valid public holiday calendar that includes all regional public holidays.

The standard system contains a sample list of public holidays and public holiday calendars.

You can define new public holidays and include them in a public holiday calendar. Existing holidays can also be partially modified or removed from a public holiday calendar.

You can delete public holiday calendars that are not used.

The validity of a public holiday calendar is specified by a validity period.

A public holiday calendar is assigned to a personnel subarea.

Public holidays are set up once and then can be incorporated in various calendars.

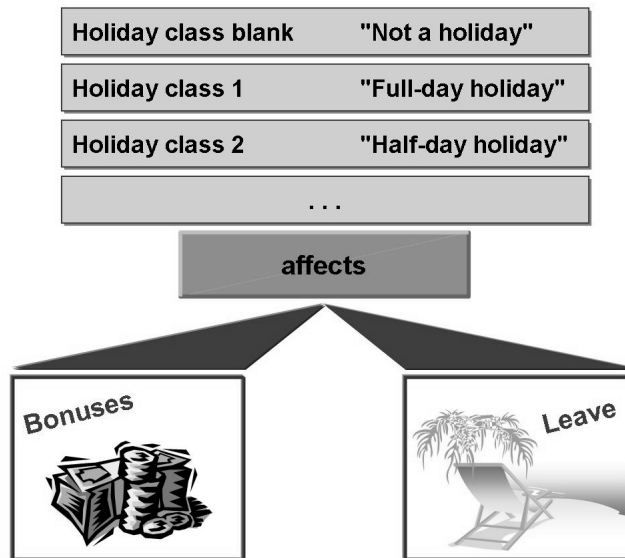
Public holidays can have one of the following characteristics:

Fixed date

Specific distance to Easter

Specific date and weekday

Without a fixed date



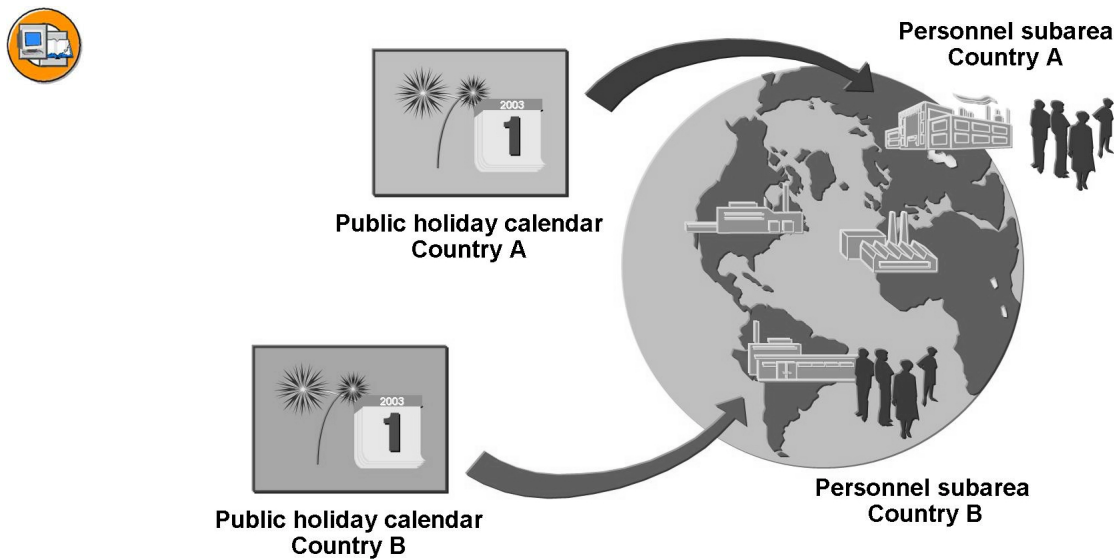
**Figure 43: Defining Public Holiday Classes**

Public holidays are grouped into public holiday classes in SAP Human Resources. The public holiday class is used for the selection of time wage types, daily work schedule variants, day types, and for absence counting.

In the standard system, the public holiday class 1 is assigned to full-day public holidays and the public holiday class 2 is assigned to half-day public holidays.

Not all public holidays are treated in the same way. Some collective agreements stipulate different holiday bonuses for working on certain public holidays, such as May 1. If you want to treat a public holiday differently, you can assign it an different public holiday class. You can use a value from 0 to 9 for the public holiday class; 0 or blank is used for days that are not public holidays.

Certain public holidays may only be relevant in specific religions, that is, the public holiday is observed only by employees of a particular religious group.



**Figure 44: Assigning Public Holiday Calendars**

Public holidays differ according to country and region. For this reason, public holidays are grouped together in public holiday calendars.

Every personnel area/personnel subarea has to be assigned a definitive public holiday calendar that is valid for the corresponding region (country, state, city, and so on).

Before you can assign holidays, you must first create the public holiday calendar and the personnel areas and subareas. The public holiday calendar that is valid for an employee depends upon the personnel area/subarea to which the employee is assigned.

**Example:**

The personnel area **0001** belongs to a plant in Argentina and is assigned the public holiday calendar **AR** (for Argentina). The personnel subarea **0002** refers to a plant in Bavaria, Germany, and is assigned the public holiday calendar **07**.



## Lesson Summary

You should now be able to:

- Describe the characteristics of public holidays
- Describe the structure of the public holiday calendar
- Understand the relevance of public holidays for payment and attendance/absence counting

## Lesson: Work Schedules

### Lesson Overview

In this lesson, you learn about the work schedule and the elements that make it up, and how to configure them.



### Lesson Objectives

After completing this lesson, you will be able to:

- Set up the individual elements of work schedules
- Generate and assign a work schedule

### Business Example

- Employees at your company work according to various work time models. Full-time employees work flextime and rotating shifts. Part-time employees work patterns such as a four-day model. Prior to public holidays, some employees work a reduced schedule.
- In this unit, you create the elements required to generate work schedules and you assign them to employees.

### Overview of Work Schedules

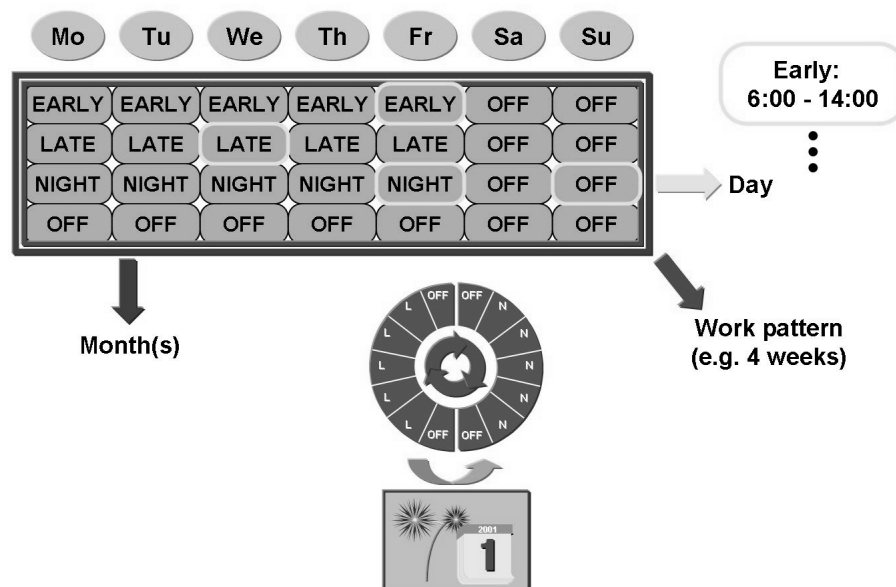


Figure 45: Work Schedule Levels

Work schedules define the work patterns for diverse groups of employees in an enterprise. Employees' contractual working times are set up in the work schedule.

A valid public holiday calendar is a prerequisite for every work schedule.

Specifications for work schedules are stored at three levels:

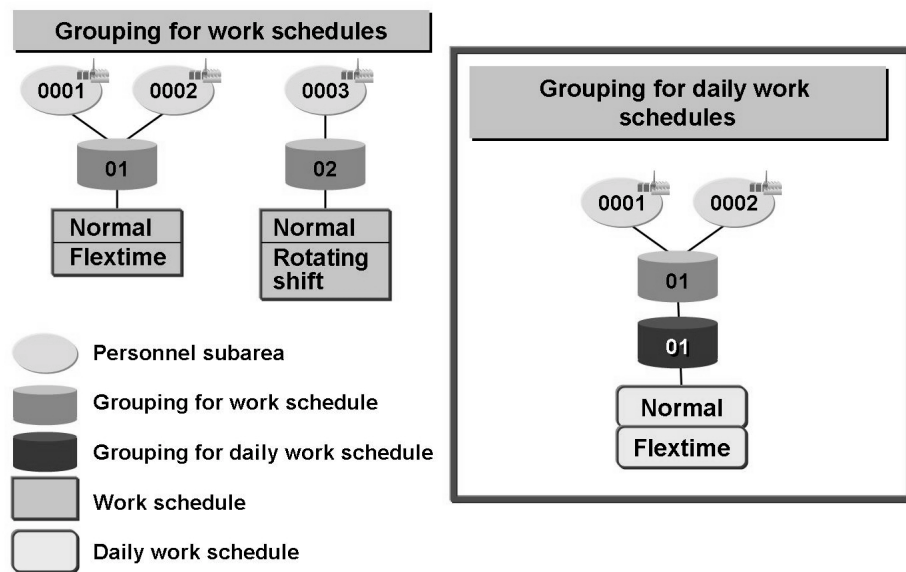
At the daily level, daily work schedules including the break schedule are specified. You can also include various daily work schedule variants (alternative versions of the daily work schedules).

At the weekly level, daily work schedules are arranged into a specific pattern in period work schedules.

At the monthly level, work schedules are created for several calendar months based on a valid public holiday calendar and a work schedule rule.

The work schedule is set up step-by-step in this unit.

Work schedules and daily work schedules can apply to one or more personnel subarea or employee subgroup groupings.



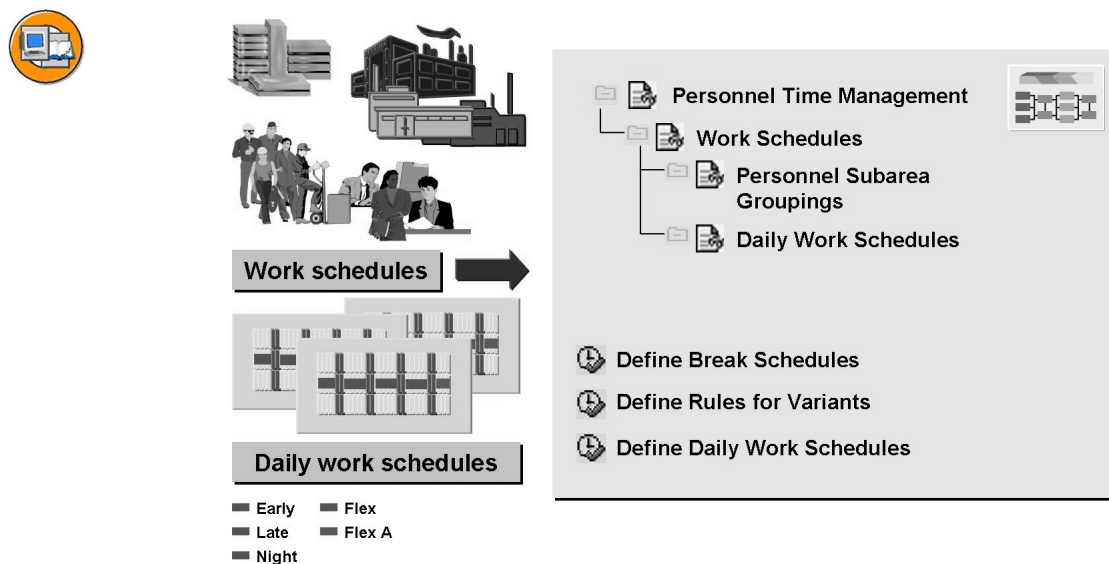
**Figure 46: Personnel Subarea Groupings**

A personnel subarea grouping for work schedules is a group of personnel subareas to which the same work schedule rules apply. This grouping allows you to control the permissibility of work schedules within the personnel subareas.

Personnel subareas for which the same work schedule rules are valid have the same grouping. Several groupings are required, however, if different work schedule rules apply to different personnel subareas.

A personnel subarea grouping for daily work schedules is a group of personnel subareas that base their daily work schedules on the same work schedules. This grouping is not assigned directly to the personnel subarea but is assigned to the grouping for work schedules. A personnel subarea grouping for daily work schedules can be assigned to one or more groupings for work schedules. In this way, the permissibility of the daily work schedules used is controlled within the personnel subareas. (The groupings for daily work schedules **01** to **50** are reserved for use in Time Management.)

**Example:** Personnel subareas **0001** and **0002** use the same work schedules and are thus assigned to the same grouping for work schedules (**01**). Consequently, they also use the same daily work schedules and are assigned to the same grouping for daily work schedules (**01**).



**Figure 47: Daily Work Schedules and Variants**

You must first define daily work schedules, including breaks, for the individual work schedules at your company.

Because some employees work a reduced schedule prior to public holidays, you must also define alternative versions of the daily work schedules, known as daily work schedule variants.

The conditions upon which the variants apply are defined in specific rules.

The smallest unit of the work schedule is the daily work schedule, which contains information on the individual workdays.

This information includes breaks and daily work schedule variants.

To set up the daily work schedules, complete the Customizing steps located in the *Work Schedules* → *Daily Work Schedules* section in the IMG for Personnel Time Management.





Break schedules							
	Start	End	Unpaid	Paid	After	RefTime	Type 1
Fixed break	12:00	13:00	1.00				
Variable break	9:30	10:00	0.25				
Dynamic break			0.25		4.00		
Overtime break	22:00	22:10	0.17				O

**Figure 48: Break Schedules**

Breaks are periods of time during the workday when employees are not required to work.

The break schedule defines the rules governing breaks in a workday. The break schedule is assigned to a personnel subarea grouping for daily work schedules. You can assign a break schedule to as many daily work schedules as you require.

Different types of breaks are defined in as follows in Time Management:

**Fixed breaks:** Breaks taken at a certain time (from 9:00 a.m. to 9:15 a.m., for example)

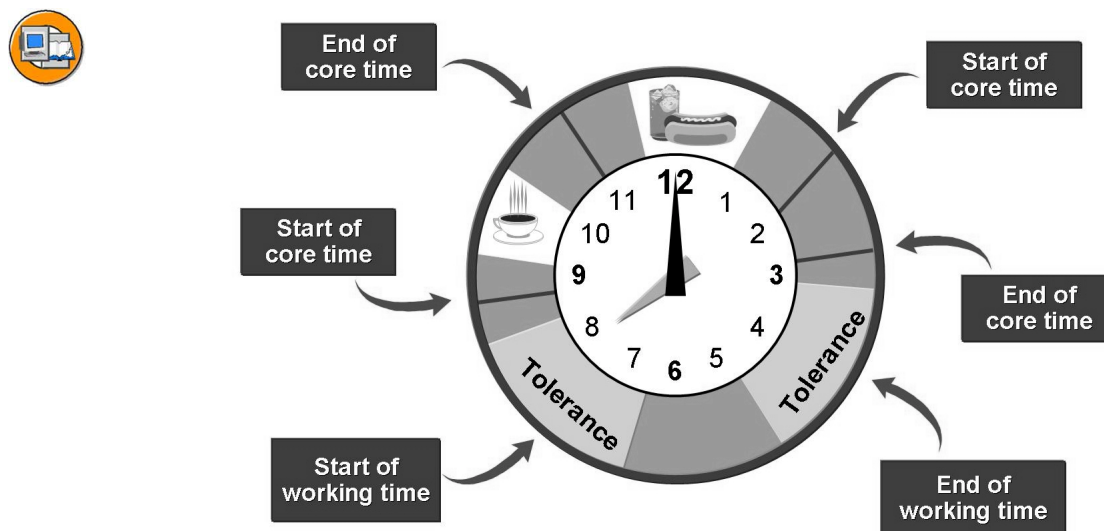
**Variable breaks:** Breaks that must be taken at any time within a specific interval. Employees themselves can determine the time when their break begins and ends (for example, an hour break to be taken between 12:00 noon and 2:00 p.m.).

**Dynamic breaks:** Breaks taken after a certain number of hours are worked (a 15-minute break must be taken after working 4 hours, for example). In the *RefTime* (reference time) field in the flextime working models, you can specify if a dynamic break is to be calculated from the start of planned working time or from the start of normal working time. The start of planned working time is the default setting in the standard system. Dynamic breaks can be defined in more detail in the DYNBR function in time evaluation.

**Overtime breaks:** Breaks taken when working overtime. The breaks are indicated by the break type 1 **O** for overtime.

You should assign breaks taken after midnight during night shifts to the previous day by activating the previous-day indicator in the *P* field.

If break schedules change after they are already assigned to daily work schedules, you must reevaluate the applicable daily work schedules. The IMG contains an activity to complete this task.



### Figure 49: Daily work schedules

A daily work schedule contains the specifications for a workday

These specifications include the start and end of working time, planned working hours, and scheduled breaks.

You can also indicate whether or not general overtime approvals are permitted in the daily work schedule.

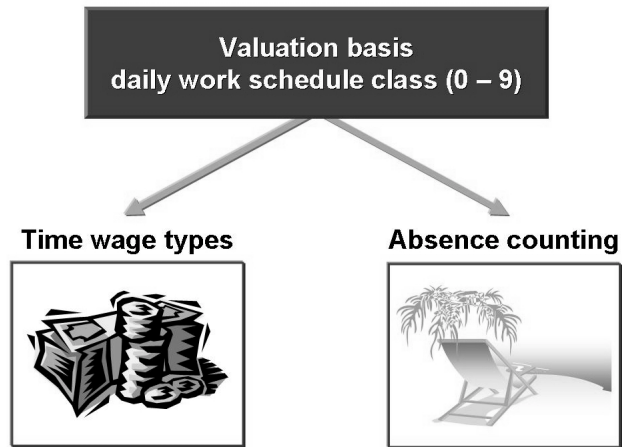
You can also add variants to the daily work schedule - a shortened version, for example. These versions are called daily work schedule variants. In the daily work schedule definition, you can specify whether or not these alternative versions of the daily work schedule are to be used.

Daily work schedules can contain predefined, fixed working times or flexible working times (flextime work schedules).

Flextime work schedules contain a period of time within which employees may clock in and clock out (where actual times are recorded).

Core times can also be defined for flextime work schedules, that is, specific times when employees are required to be at work.

Daily work schedules can also contain begin and/or end tolerances. This prevents clock-in/clock-out times that differ only slightly from normal start or end of working time from being interpreted as overtime or working time violations.

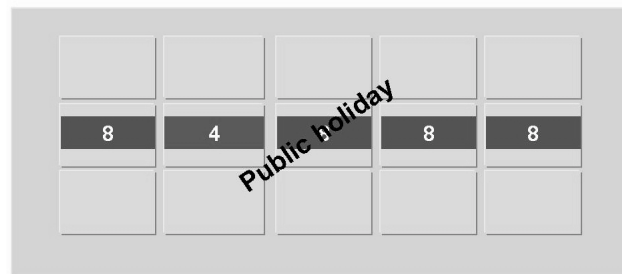


**Figure 50: Daily Work Schedule Classes**

A daily work schedule is a description of the duration and location of working time for an employee on any given workday.

A daily work schedule class is assigned to a daily work schedule, which is used as the valuation basis for the daily work schedule. Daily work schedule classes have a twofold purpose - they specify the conditions and rules for generating time wage types and also determine how absences and attendances are counted.

The *No planned working hours* checkbox is used to indicate daily work schedules containing days off. You can assign daily work schedule classes 0 – 9, as necessary, to distinguish the individual work schedules.



**8 hours** Regular daily work schedule

**4 hours** Variant → always before public holidays

**Figure 51: Daily Work Schedules and Variants**

You can also create different versions of the daily work schedule, for example, a shortened version. These versions are called daily work schedule variants. Daily work schedule variants can be used prior to public holidays, for example.

A daily work schedule variant is an alternative version of a daily work schedule. A daily work schedule variant has the same name as the original daily work schedule, but an additional indicator, a letter or number, distinguishes it from its corresponding daily work schedule.

The daily work schedule variants can be included automatically when the system generates the monthly work schedules. To do so, you define rules that determine the conditions to be met in order for the daily work schedule variant to be used on a specific day, such as on days preceding public holidays.

#### Example:

Employees with flexible working times who work Monday through Friday according to the daily work schedule **FLEX** work fewer hours than usual prior to public holidays. This scenario can be set up by using a daily work schedule variant. The daily work schedule variant must in this example be called **FLEX** plus an additional indicator, such as **FLEX B** or **FLEX 1**, to distinguish it from the regular daily work schedule.



Rules to determine variants					
Rule	No	Holiday class b123456789	Hol.cl.next day b123456789	Weekday 1234567	Variant
01	01	.. x . . . . .	xxxxxxxxxxx	xxxxxxx	B
01	02	xx. xxxxxxxx	xxxxxxxxxxx	.... x ..	B

Selection rule for daily  
work schedule variants  
from the daily work schedule

**Figure 52: Daily Work Schedules: Variant Rules**

Rules for daily work schedule variants are indicated by a two-digit number (rule). The daily work schedule specifies which selection rule is used to determine the daily work schedule variant. Therefore, a rule must already exist.

A rule can belong to several daily work schedules. Corresponding variants must exist for these daily work schedules, such as **FLEX B**, **NORM B**, and so on.

If a rule is applicable, the daily work schedule variant for the corresponding day (the current day) is referenced when the work schedule is generated.

Rules are defined for daily work schedule variants depending on the following characteristics:

Public holiday class of the current day

Public holiday class of the following day

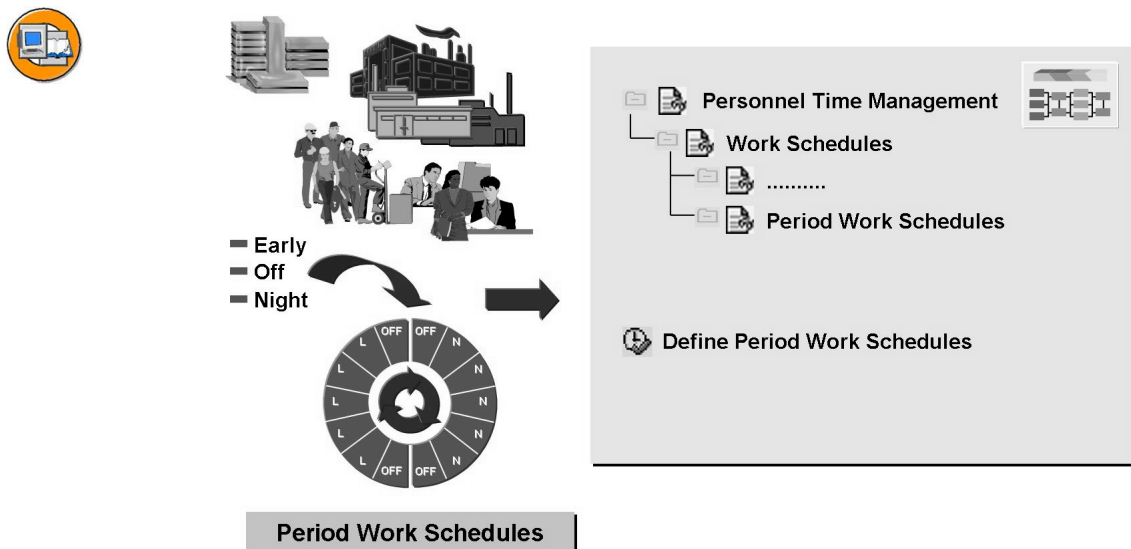
Day of the week of the current day

A rule may contain several subrules. All subrules of the rule are run through sequentially until one of them applies. If no subrule is applicable, then no daily work schedule variant is referenced.

**Example:** For the above variant rule **01**, consisting of two subrules, **01** and **02**:

**Subrule 01:** A daily work schedule variant with the suffix **B** is referenced when the current day is a half-day public holiday (public holiday class **2**), regardless of whether or not the following day is a public holiday (no matter what public holiday class), and regardless of the day of the week of the current day.

**Subrule 02:** Variant **B** is referenced when the current day is not a half-day public holiday (all public holiday classes except **2**), regardless of whether or not the following day is a holiday (no matter what public holiday class), and if the current day is a Friday (Day 5).



**Figure 53: Period Work Schedules**

Employees work according to various work patterns. Some work at the same times and on the same days every week, others work different times from week to week. Some employees work on weekends, others do not.

A working time pattern is represented in a period work schedule through a corresponding sequence of daily work schedules.

To set up the period work schedules, complete the Customizing steps located in the *Work Schedules* → *Period Work Schedules* section in the IMG for Personnel Time Management.



Grpg	PWS	PeriodWS	Text	WkNo	01	02	03	04	05	06	07
01	Flex	Flex		001	FLEX	FLEX	FLEX	FLEX	FLEX	OFF	OFF
01	M3	3-shift	4W	001	E-11	E-11	E-11	E-11	E-11	E-11	OFF
01	M3	3-shift	4W	002	L-11	L-11	L-11	L-11	L-11	OFF	N-11
01	M3	3-shift	4W	003	N-11	N-11	N-11	N-11	N-11	OFF	OFF
01	M3	3-shift	4W	004	OFF	OFF	OFF	OFF	OFF	OFF	OFF

Group of daily work  
schedules in a  
specific pattern

FLEX: Weekly work pattern

M3: 3-shift operation over 4-week period

**Figure 54: Period Work Schedules: Work Patterns**

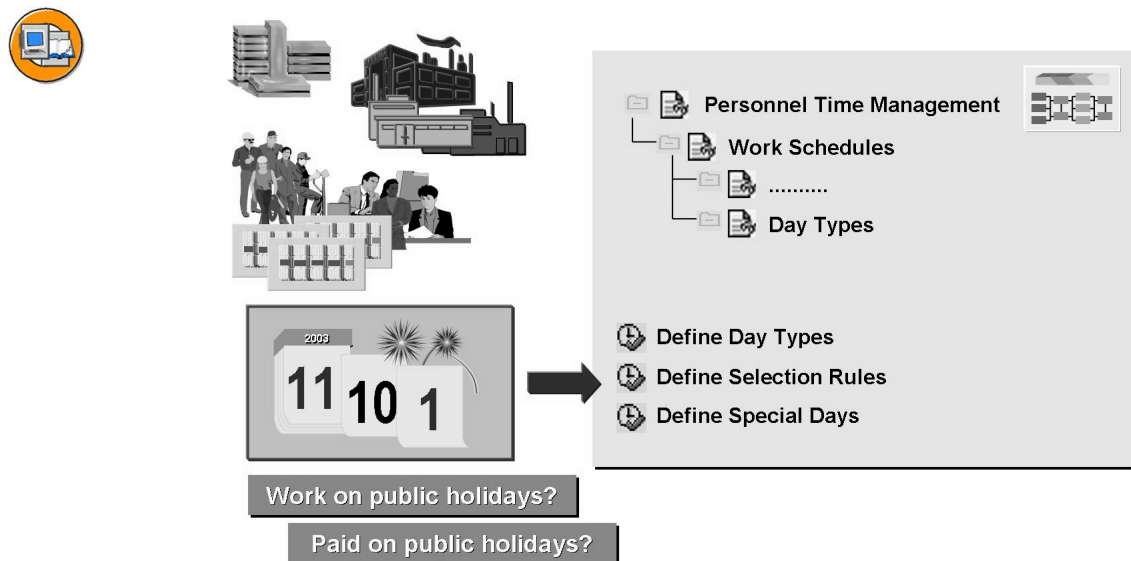
A period work schedule is the basis for generating a work schedule.

A period work schedule consists of a sequence of daily work schedules representing a certain work pattern.

A period work schedule can cover one week or more weeks, or even a part of a week.

The period work schedule is applied to a horizontal time axis (a valid public holiday calendar) that is then "rolled" (repeated) until a month or a longer period of time is completely covered. In other words, the pattern defined in the period work schedule repeats itself continuously.

The personnel subarea grouping for daily work schedules is a group of personnel subareas that use the same daily work schedules, period work schedules, and break schedules.




**Figure 55: Day Types and Selection Rules**



At your company, most employees in the production plant work on public holidays, for example. Other employees, such as salaried employees at headquarters and in administration, do not work on public holidays, but are paid for these days off.

Day types are used for determining whether employees have to work on public holidays and whether they are still paid on these days.

To set up day types, complete the Customizing steps located under *Work Schedules* → *Day Types* in the IMG for Personnel Time Management.



Day types	Meaning
blank	Work/paid
1	Off/paid
2	Off/unpaid
3	Off/special day
...	...

**Figure 56: Day Types: Definition**

Public holidays on working days, Saturdays, and Sundays can be handled differently for various employee groups. The deciding factors are whether or not employees must work on a specific day and whether or not they are paid.

The day type determines payment as well as planned absences and attendances for a specific calendar day in the work schedule. The day type is necessary for absence counting and for wage type selection.

The standard system contains four day types:

**blank:** Day on which an employee works and is paid

**1:** Day on which an employee does not work, but is still paid

**2:** Day on which an employee does not work and is also not paid

**3:** Special day on which an employee does not work and is paid according to payroll rules

In the work schedule, the day type determines whether employees must work on a specific day and whether or not they are paid.



		Weekday									Saturday									Sunday											
Rule	with holiday class	b	1	2	3	4	5	6	7	8	9	b	1	2	3	4	5	6	7	8	9	b	1	2	3	4	5	6	7	8	9
01	gives day type	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1

Assignment in  
work schedule rule

**Rule explanation:**

If a day with holiday class "blank" falls on a weekday, the day is considered a paid workday.

If a public holiday with holiday class 1 falls on a weekday, the day is considered a paid day off.

If a public holiday with holiday class 2 falls on a weekday, the day is considered a paid workday.

The same rules apply to Saturdays and Sundays.

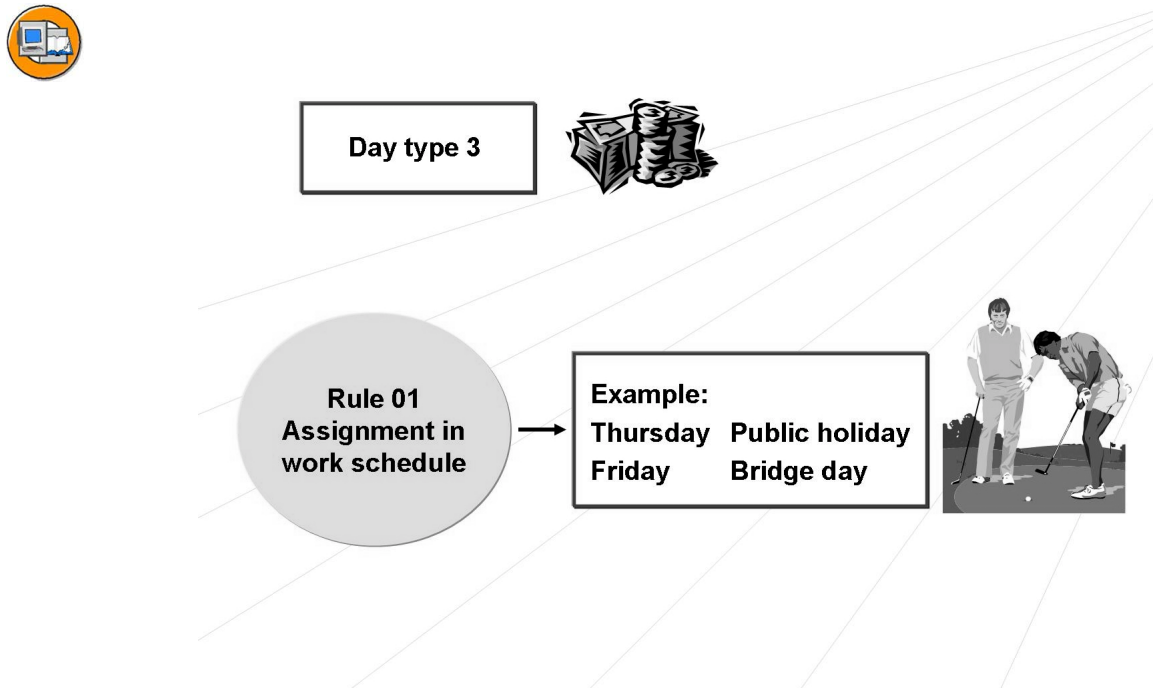
**Figure 57: Define Selection Rules**

Day types are assigned to the individual calendar days using selection rules for day types.

The day type is determined by the day of the week (weekday, Saturday, Sunday) and by the public holiday class for that day of the week.

The selection rules are indicated by a number (rule). The work schedule rule specifies which rule is used to determine the day type.





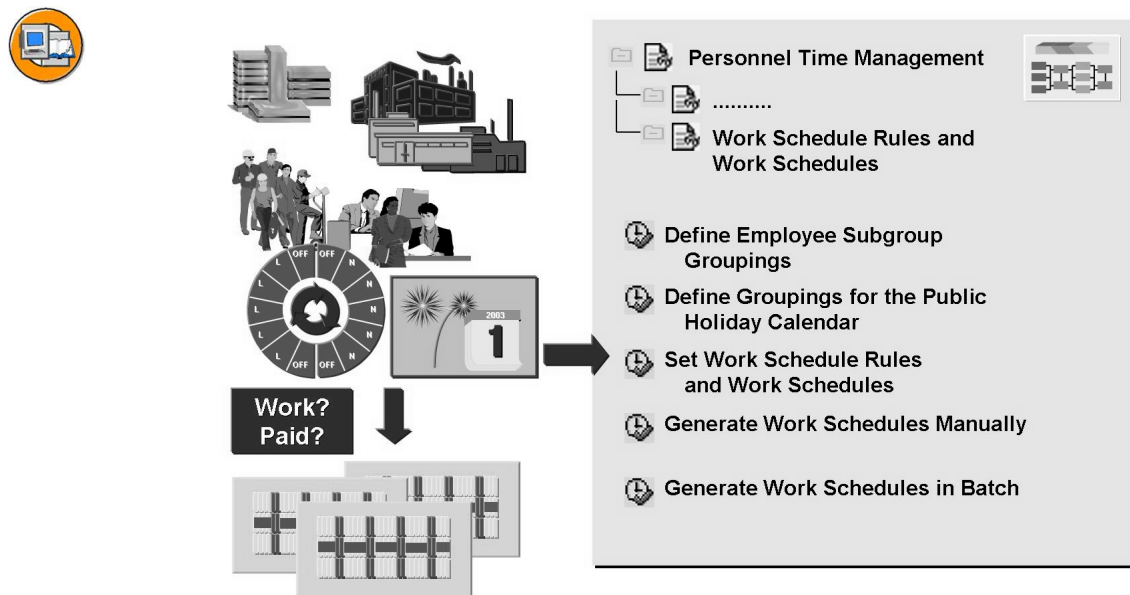
**Figure 58: Defining Special Days**

Special days are days that are not public holidays but are handled differently. Such special days include "bridge days" immediately before or after a public holiday, that is, days on which a group of employees might be off work.

Special days are indicated by day type **3** in the standard system. A special day is defined by a specific date; the applicable day type for special days is assigned directly, regardless of the day of the week or public holiday class. This date is assigned to a selection rule for day types. One or more special days can be defined for each selection rule.

The selection rule for day types (including the specification of special days) is assigned to the work schedule rule.

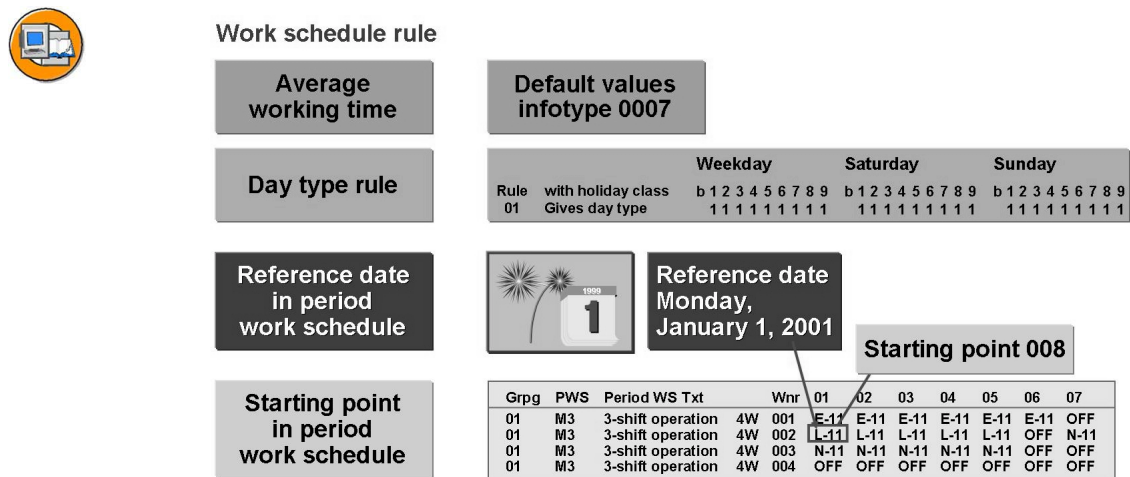
You determine the payment for special days in Payroll.



**Figure 59: Work Schedule Rules and Work Schedules**

After the individual elements have been set up for work schedules, you can now define work schedule rules, including flextime models or rotating shifts. Work schedules can then be generated and assigned to employees.

To define work schedule rules and generate monthly work schedules, complete the Customizing steps in the *Work Schedules* → *Work Schedule Rules and Work Schedules* section of the IMG for Personnel Time Management.



**Figure 60: Defining Work Schedules: Work Schedule Rules**

The work schedule rule contains employees' average working times.

This data is used in payroll, for example.

You can store various rules relating to work on public holidays in the work schedule rule. This is determined by the selection rules for day types. Day types specify whether or not employees must work on public holidays and whether they are paid for the work.

To apply ("roll") the period work schedule to the public holiday calendar, you must enter two pieces of information in a work schedule rule:

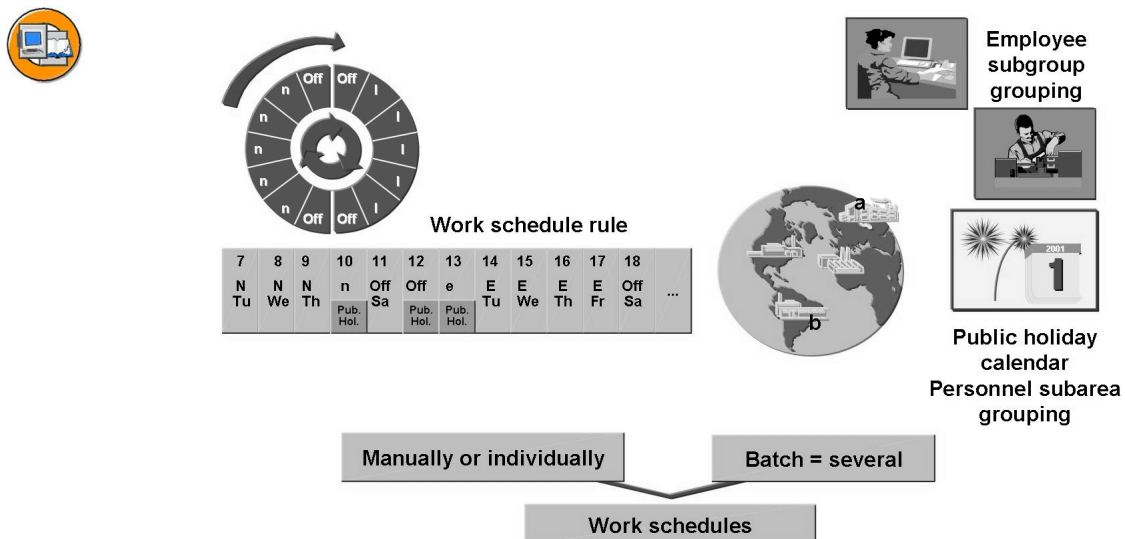
Reference date, that is, the date on which the period work schedule is to start. You are advised to use a reference date that falls on a Monday.

Starting point, that is, the position in the period work schedule at which the reference date is set.

**Example:** You choose January 01, 2001 (a Monday) as the reference point, and **008** (8th day in the period work schedule) as the starting point. The late shift applies on January 1, the days before and after this reference date are assigned an applicable daily work schedule once the period work schedule is applied.

Several work schedule rules can be based on one period work schedule. You can use a period work schedule for as many public holiday calendars as required. When the system generates the work schedule, it references the public holiday calendar stored in the work schedule rule.

**Note:** You can use one period work schedule for different work schedule rules in rotating shifts. To do so, you only have to move the starting point by one week (starting point **001**, **008**, and so on).



**Figure 61: Work schedule**

Defining planned working time for individual employees plays a central role in Time Management. This is set up in the HR system using work schedules.

The work schedule is generated by applying the period work schedule to a horizontal axis, the public holiday calendar, and repeated until the selected period is covered.

Work schedules **MUST** be generated. You can do this either manually or in batch.

Work schedules can be generated only if all required groupings are made and the work schedule rule is defined beforehand.

The automatic alternative enables multiple work schedules to be generated. These are generated out in a batch input session.

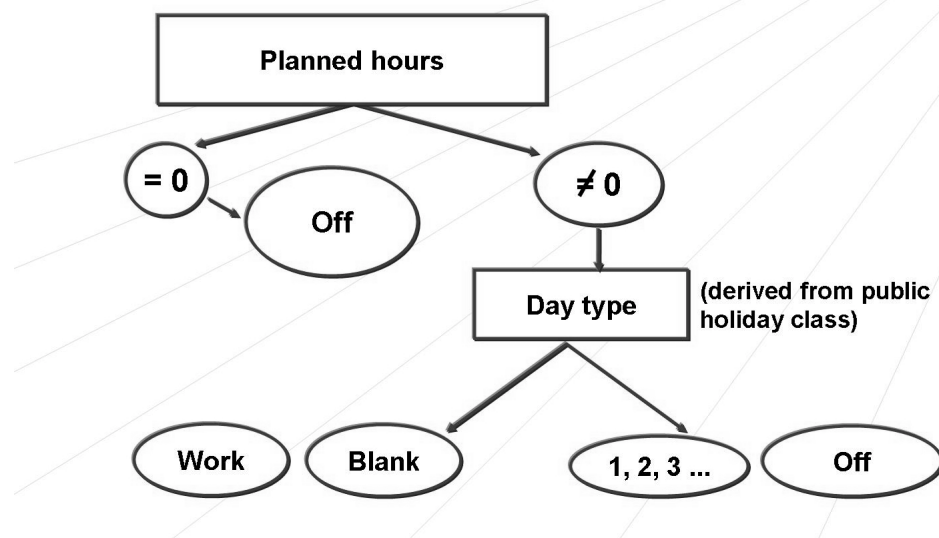
If you want all work schedules to be generated at one time, you only need to enter the time period to be generated. This method of generating work schedules does not apply to more than one client at one time.

**Important note:**

A previous and subsequent period of the work schedule must exist for each period to be calculated.



**When do employees have to work and when are they off?**



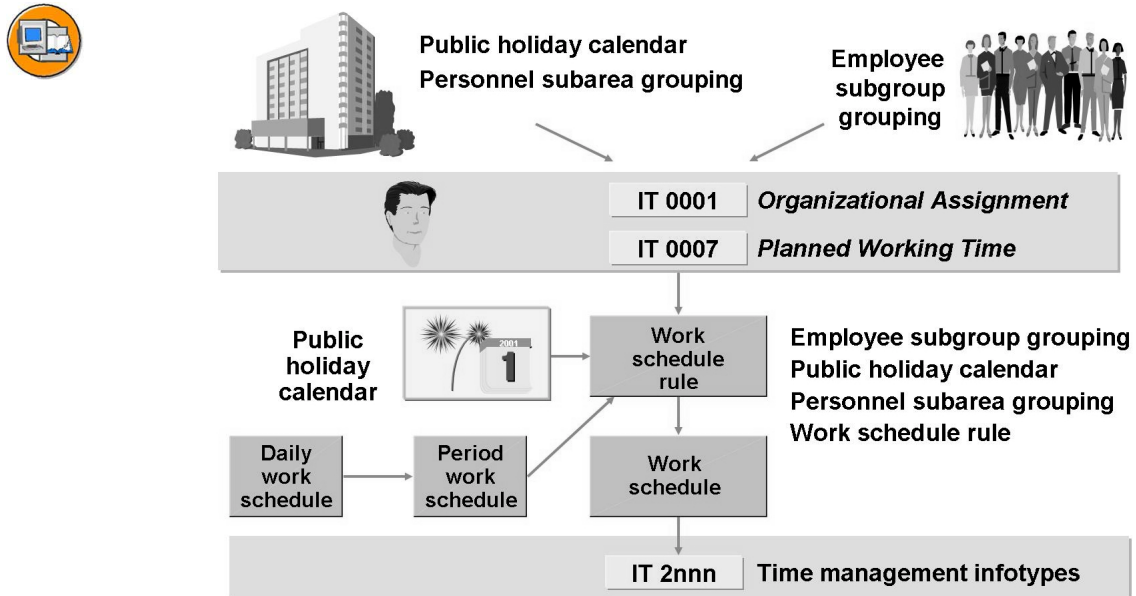
**Figure 62: Determining Workdays**

Whether or not a day is a day off in the work schedule is based on the following criteria:

Planned hours

Day type (derived from the public holiday class)

First, the planned hours are queried in the daily work schedule. If there are zero planned hours, the day is a day off; if not, the system checks the day type. The public holiday class is explicitly checked because the day type is derived from the public holiday class in the corresponding selection rules. In other words, the day type is always determined in accordance with the public holiday class. If the day type is not blank, the day is a day off.



**Figure 63: Planned Working Time**

The work schedule is assigned to an employee using the work schedule rule in the *Planned Working Time* infotype (0007).

The employee's place in the enterprise structure defined in the *Organizational Assignment* infotype (0001) determines which work schedules can be assigned to him or her.

Data stored in the *Organizational Assignment* infotype (0001) determines whether a work schedule is permitted for a certain employee. Criteria such as employee subgroup and personnel area/subarea are checked. The system also checks if the work schedule was also generated for the employee subgroup or personnel area/subarea in question.



**Create Planned Working Time**

Work schedule

Work schedule rule: FLEX

Time Mgmt status: No tin

☐ Part-time employee

Working time

Employment percent	100.00
Daily working hours	7.20
Weekly working hours	36.00
Monthly working hrs	156.48
Annual working hours	1879.20
Weekly workdays	5.00

Default values of the average working hours from the work schedule

**Figure 64: Planned Working Time: Overview**

An employee's working time is stored as a work schedule rule in the *Planned Working Time* infotype (0007). In this infotype you also find the average working hours valid for the employee. These hours come from the definition of the work schedule rule.

In a business sense, planned working time is defined as the time between the start and end of work, excluding breaks. Planned working time specifies the time an employee has to work each day at the enterprise.

The *Time Management status* specifies whether the employee's times are processed using time evaluation or payroll.

Examples:

Time Management status:

0 = No time evaluation (processed in payroll)

1 = Evaluation of actual times

9 = Evaluation of planned times

An employee with the time management status of BLANK or 0 cannot be processed using time evaluation. This employee's time data is processed in payroll

Individualized information on an employee's working time is represented in their **personal work schedule**. Personal work schedules contain any recorded changes and exceptions to employees' working time (such as substitutions), as well as any changes made at a higher level (employee subgroup groupings or personnel subarea groupings). An employee's actual working hours (including any modifications to working time) for each month are included in the personal work schedule.

**Figure 65: Default Values for Planned Working Time**

You can use the **SCHKZ** feature to store default values for the *Planned Working Time* infotype (0007).

When you assign an employee a **planned working time** for the first time, on hiring, for example, you can use a **feature** to create a default for the work schedule based on the employee's organizational assignments.

For example, if you want to assign the FLEX work schedule to all salaried employees in the DT employee subgroup, but want the NORM work schedule to be the default for all other employees.

To access the feature, choose the following IMG path: *Personnel Time Management* → *Work Schedules* → *Planned Working Time* → *Set Default Value for the Work Schedule*; alternatively, access transaction PE03 (*Features: Initial Screen*) and enter **SCHKZ** as the feature. You can use the **TMSTA** feature to store default values for the Time Management status in the *Planned Working Time* infotype (0007).

The Time Management status specifies whether an employee is included in time evaluation and, if so, the type of time evaluation. You can use the feature to store a default value for the Time Management status in the *Planned Working Time* infotype which is used when an infotype record is created. You can have the value determined on the basis of an employee's organizational assignment.

The possible values are:

- 0 No time evaluation
- 1 Time evaluation of actual times
- 2 PDC time evaluation

7 Time evaluation without payroll integration

8 External services

9 Time evaluation of planned times

For example, you may want employees in **personnel area 0001** to take part in time evaluation, but not employees in personnel area **0002**. (default value 1 or 0)



## Exercise 3: Creating Work Schedules

### Exercise Objectives

After completing this exercise, you will be able to:

- Create all elements of the work schedule

### Business Example

Employees at your company work according to various work schedules. You set up and generate work schedules and assign them to employees at the CAB Company. In this exercise, you can choose between a work schedule with normal working time and a rotating shift.

#### Option 1: Regular Working Time (Karin Anderson) Work Schedules: Individual Elements (Regular Working Time)



**Hint:** If the system asks you to enter a country grouping, enter **99 – Rest of world**.

Follow the Customizing steps described below to create a work schedule with regular working times. When possible, copy sample work schedules provided in the system, and modify them as required. Finally, assign the generated work schedule, now called the work schedule, to your salaried employee.

### Task 1:

Enter the IMG

1. In the Implementation Guide, choose *Personnel Time Management → Work Schedules*.

### Task 2:

Check groupings

1. Check to make sure the grouping for work schedules for your personnel subarea **TP## Production ##** is **01**.
2. Check to make sure the grouping for daily work schedules for your personnel subarea **TP## Production ##** is **01**.

*Continued on next page*

### Task 3:

Define a break schedule

1. Create break schedule **PA##**. Enter three unpaid breaks as follows: From **12:00 to 1:30 p.m.**, employees are entitled to a one-hour lunch break. From **3:00 to 3:15 p.m.**, employees may take a coffee break. Enter an overtime break from **10:00 p.m. to 10:15pm**. Use the grouping for daily work schedules **01**.

### Task 4:

Define rule for variants

1. The variant **1** is always valid on days defined by public holiday class **2** and on Fridays. Create rule **10 + ##** by copying and modifying the existing rule.

### Task 5:

Define a daily work schedule

1. Define the daily work schedule **TZ## (Normal ##)**. Copy the daily work schedule **F-11**. Choose the grouping for daily work schedules **01**. Work starts at **08:00**, with a planned working time of 8 hours. Assign the break schedule **PA##** you previously created to the daily work schedule. Use the daily work schedule rule **10 + ##** that you also created previously.

### Task 6:

Define a daily work schedule variant

1. Define a shortened version of your daily work schedule **TZ##** as variant **1** with four planned working hours from **8:00 a.m. to 12:00 noon**.

### Task 7:

Define a period work schedule

1. Group the daily work schedules **TZ##** and **OFF** into one period work schedule called **PZ##**. You can copy an existing period work schedule. Choose the grouping for daily work schedules **01**.
2. Employees work from Day 1 to Day 5 according to the daily work schedule **TZ##**, and are off on Day 6 and Day 7 (daily work schedule **OFF**).

*Continued on next page*

## Task 8:

Check selection rule for day types

1. Your employees do not have to work on **full-day** public holidays (public holiday class **1**). Work is paid on **half-day** public holidays (public holiday class **2**). Check the selection rule **01**. This rule will be referenced later in the work schedule rule.

## Task 9:

Define work schedule rule **AZ##**

1. In the Implementation Guide, choose  
***Personnel Time Management → Work Schedules → Work Schedule Rules and Work Schedules***  
and carry out the steps in sequence.
2. Check employee subgroup grouping  
Check the employee subgroup grouping. Make sure that an employee subgroup grouping already exists for your employees.
3. Check public holiday calendar  
Check the public holiday calendar assigned to the personnel subarea **TP## Production ##**.
4. Define a work schedule rule (1)  
Define the work schedule rule **AZ##**. Copy the work schedule rule **FLEX**. Use the employee subgroup grouping *Salaried employees* and the public holiday calendar assigned to your personnel subarea **TP##**, as well as the personnel subarea grouping for work schedules of your personnel subarea (**01**).  
Adopt the rule for day type **01**.  
Use your period work schedule **PZ##** and check the reference date and starting point.
5. Generate a work schedule for regular working time  
Generate the work schedule **AZ##** for the work schedule rule you created for a period of three years. As a start date, choose the December of the previous year, and as an end date the January of the current year plus 3.
6. Assign work schedule  
Assign the generated work schedule to your salaried employee, Karin Anderson (**306992##**, where **##** = your group number), starting the first of this month in the *Planned Working Time* infotype.

## Solution 3: Creating Work Schedules

### Task 1:

Enter the IMG

1. In the Implementation Guide, choose *Personnel Time Management* → *Work Schedules*.
  - a) To access Customizing, choose *Tools* → *Customizing* → *IMG* → *Execute Project*.

The *Customizing: Execute Project* screen appears. If no project IMG for Time Recording has been generated, choose *Display SAP Reference IMG* or *Goto* → *Display SAP Reference IMG*.

If a project IMG has been created (announced by the instructor), choose *Add to worklist*. In the subsequent *Add Project/Views to Worklist* window, check the corresponding project and choose *Copy*. Select the project now in your Customizing worklist and then choose *Display project*. The IMG appears for your project.
  - b) In the Implementation Guide, choose *Personnel Time Management* → *Work Schedules*.

### Task 2:

Check groupings

1. Check to make sure the grouping for work schedules for your personnel subarea **TP## Production ##** is **01**.
  - a) Choose the menu path:

***Personnel Time Management* → *Work Schedules* → *Personnel Subarea Groupings* → *Group Personnel Subareas for the Work Schedule***

The grouping for work schedules for your personnel subarea **TP##** must be **01**.
2. Check to make sure the grouping for daily work schedules for your personnel subarea **TP## Production ##** is **01**.
  - a) Choose the menu path:

***Personnel Time Management* → *Work Schedules* → *Personnel Subarea Groupings* → *Group Personnel Subareas for the Daily Work Schedule***

The personnel subarea grouping for daily work schedules **01** must be assigned to the above personnel subarea grouping for work schedules.

*Continued on next page*

### Task 3:

Define a break schedule

1. Create break schedule **PA##**. Enter three unpaid breaks as follows: From **12:00 to 1:30 p.m.**, employees are entitled to a one-hour lunch break. From **3:00 to 3:15 p.m.**, employees may take a coffee break. Enter an overtime break from **10:00 p.m. to 10:15pm**. Use the grouping for daily work schedules **01**.

- a) Choose the menu path:

**Personnel Time Management → Work Schedules → Daily Work Schedules → Define Break Schedules.**

In the subsequent dialog box, choose (double-click) the **Determine Break Schedules** activity.

Copy an existing break schedule or choose *New entries*.

Because your break schedule consists of three breaks, you need three rows.

Use the grouping for daily work schedule **01** and call your break schedule **PA##**. Number the rows of your break schedule from **01** to **03**. Enter three unpaid breaks as follows: From **12:00 to 1:30 p.m.**, employees are entitled to a one-hour lunch break. From **3:00 to 3:15 p.m.**, employees may take a coffee break. Enter an overtime break from **10:00 p.m. to 10:15pm**. In the *Start* and *End* columns, enter the applicable times; enter the duration of the break in industrial hours (decimals) in the *Unpaid* column. To indicate an overtime break, you must enter the break type **O** (for overtime) in the **Type 1** column.

*Continued on next page*

## Task 4:

Define rule for variants

1. The variant **1** is always valid on days defined by public holiday class **2** and on Fridays. Create rule **10 + ##** by copying and modifying the existing rule.
  - a) Choose the menu path:

**Personnel Time Management → Work Schedules → Daily Work Schedules → Define Rules for Variants.** The variant **1** of your daily work schedule is to be valid on half-day holidays as well as full-day holidays. To set up this up, create the rule **10 + ##**:

Rule	No.	Holiday class	Hol.cl.sub.day	Weekday	Variant
		b123456789	b123456789	1234567	
10 + ##	01	..x.....	xxxxxxxxxxx	xxxxxxx	1
10 + ##	02	xx.xxxxxxx	xxxxxxxxxxx	....x..	1

*Continued on next page*

## Task 5:

Define a daily work schedule

1. Define the daily work schedule **TZ## (Normal ##)**. Copy the daily work schedule **F-11**. Choose the grouping for daily work schedules **01**. Work starts at **08:00**, with a planned working time of 8 hours. Assign the break schedule **PA##** you previously created to the daily work schedule. Use the daily work schedule rule **10 + ##** that you also created previously.

- a) Choose the menu path:

***Personnel Time Management → Work Schedules → Daily Work Schedules → Define Daily Work Schedules.***

Select the entry **F-11** and then choose **Copy**, or choose **Edit → Copy as** from the menu.

Enter **01** in the *DWS grouping* field and in the *Daily work schedule field* **TZ##** (## = your group number). Name it **Normal ##**.

Modify the planned working time as follows:

**Planned working hours: 8**

Start of planned working time: **8:00 a.m.**

Enter the **rule 10 + ##** you created in the *DWS selection rule* field.

In the *Break schedule* field, assign the break schedule **PA##** that you defined previously.

Save your entries.

*Continued on next page*

## Task 6:

Define a daily work schedule variant

1. Define a shortened version of your daily work schedule **TZ##** as variant **1** with four planned working hours from **8:00 a.m.** to **12:00 noon**.

- a) Choose the menu path:

***Personnel Time Management → Work Schedules → Daily Work Schedules → Define Daily Work Schedules.***

Select the entry **TZ##** and then choose **Copy**, or choose **Edit → Copy as** from the menu. Enter **TZ## variant 1** by filling the one-digit field for the variant after the field for the daily work schedule.

Modify the planned working time as follows:

**Planned working hours: 4**

Start of planned working time: **8:00 a.m.**

Remove the entry **PA##** in the *Break schedule* field.

Save your entries.

## Task 7:

Define a period work schedule

1. Group the daily work schedules **TZ##** and **OFF** into one period work schedule called **PZ##**. You can copy an existing period work schedule. Choose the grouping for daily work schedules **01**.

- a) Choose the menu path:

***Personnel Time Management → Work Schedules → Period Work Schedules → Define Period Work Schedules.***

Select and copy one of the existing period work schedules. Name your new period work schedule **PZ##** (## = your group number) and enter a description of your choice. Use the grouping for daily work schedules **01**. The week number should be **001**.

2. Employees work from Day 1 to Day 5 according to the daily work schedule **TZ##**, and are off on Day 6 and Day 7 (daily work schedule **OFF**).

- a) For days **01** to **05**, enter the daily work schedule **TZ##**, and the daily work schedule **OFF** for days **06** and **07**.

*Continued on next page*



## Task 8:

Check selection rule for day types

1. Your employees do not have to work on **full-day** public holidays (public holiday class **1**). Work is paid on **half-day** public holidays (public holiday class **2**). Check the selection rule **01**. This rule will be referenced later in the work schedule rule.

- a) Choose the menu path:

***Personnel Time Management → Work Schedules → Day Types → Define Selection Rules.***

Check the selection rule **01**. It will be referenced again in the work schedule rule. Your employees have to work on half-day public holidays, but not full-day public holidays.

Rule		Weekday	Saturday	Sunday
	With holiday class	b123456789	b123456789	b123456789
01	Gives day type	1 1111111	1 1111111	1 1111111

## Task 9:

Define work schedule rule AZ##

1. In the Implementation Guide, choose

***Personnel Time Management → Work Schedules → Work Schedule Rules and Work Schedules***

and carry out the steps in sequence.

- a) In the Implementation Guide, choose

***Personnel Time Management → Work Schedules → Work Schedule Rules and Work Schedules***

2. Check employee subgroup grouping

*Continued on next page*

Check the employee subgroup grouping. Make sure that an employee subgroup grouping already exists for your employees.

- a) Check employee subgroup grouping

Choose **Personnel Time Management** → **Work Schedules** → **Work Schedule Rules and Work Schedules** → **Define Employee Subgroup Groupings**.

Check whether an employee subgroup grouping already exists for *Salaried employees* and make a note of the grouping. To do so, choose → **Define Employee Subgroup Grouping**.

Go back one step and choose

**Group Employee Subgroups for Work Schedules**.

Check whether the above employee grouping for work schedules is assigned to your employee subgroup (*Salaried employees*).

3. Check public holiday calendar

Check the public holiday calendar assigned to the personnel subarea **TP## Production ##**.

- a) Check public holiday calendar

Choose → **Work Schedule Rules and Work Schedules** → **Define Groupings for the Public Holiday Calendar**.

Check whether a public holiday calendar is already assigned to your personnel subarea **TP##**. Use the following public holiday calendar:

99
----

4. Define a work schedule rule (1)

Define the work schedule rule **AZ##**. Copy the work schedule rule **FLEX**. Use the employee subgroup grouping *Salaried employees* and the public holiday calendar assigned to your personnel subarea **TP##**, as well as the personnel subarea grouping for work schedules of your personnel subarea **(01)**.

Adopt the rule for day type **01**.

*Continued on next page*

Use your period work schedule **PZ##** and check the reference date and starting point.

- a) Define a work schedule rule (1)

Choose the menu path:

***Work Schedule Rules and Work Schedules → Set Work Schedule Rules and Work Schedules***

Select and copy an existing entry for salaried employees, such as FLEX. Use the employee subgroup grouping 2, the public holiday calendar assigned to your personnel subarea, and the personnel subarea grouping for work schedules 01. Name your work schedule rule **AZ##** (## = your group number) and enter a description of your choice.

**Note:**

If the work schedule you have copied has any entry in the Alternative work schedule rule field in the *Reduced work* area, delete this entry before saving your work schedule rule.

- b) Adopt the rule for day type **01**.
- c) Enter the period work schedule you created, **PZ##**, in the appropriate field. Choose **January 1, 1990**, as the reference date (or another Monday), and **001** as the starting point. Save your entries.

Save your entries.

5. Generate a work schedule for regular working time

*Continued on next page*

Generate the work schedule **AZ##** for the work schedule rule you created for a period of three years. As a start date, choose the December of the previous year, and as an end date the January of the current year plus 3.

- a) Generate a work schedule for regular working time. Choose the menu path:

***Personnel Time Management → Work Schedules → Work Schedule Rules and Work Schedules → Generate Work Schedules Manually***

Enter the following values in the entry screen for the work schedule:

Employee subgroup grouping	2
Holiday calendar	Public holiday calendar for your personnel subarea (99)
Personnel subarea grouping	01
Work schedule rule	AZ##
Calendar month from	December of previous year (in number format)
Calendar month to	January of current year + 3 (in number format)

**Note:**

The instructor may announce a different generation period

Choose the *Create all* option, or choose **Edit → Create all** from the menu.

6. Assign work schedule

*Continued on next page*

Assign the generated work schedule to your salaried employee, Karin Anderson (**306992##**, where ## = your group number), starting the first of this month in the *Planned Working Time* infotype.

a) Assign work schedule

Open a new session (choose *System* → *Create session*) and then choose from the menu:

***Human Resources* → *Time Management* → *Administration* → *Time Data* → *Maintain*.**

For your salaried employee with the personnel number **306992##**, complete the following steps: Enter **Planned Working Time** (0007) in the *Infotype* field. Choose *Create* or *Edit* → *Create* from the menu. Enter the first of the current month as the valid from date.

Enter the work schedule rule **AZ##**.

Choose *Enter* to confirm the warning that appears and then save your entries.



## Exercise 4: Creating Work Schedules (2)

### Exercise Objectives

After completing this exercise, you will be able to:

- Create all elements of the work schedule

### Business Example

Employees at your company work according to various work schedules. You set up and generate work schedules and assign them to employees at the CAB Company. In this exercise, you can choose between a work schedule with normal working time and a rotating shift.



**Hint:** If the system asks you to enter a country grouping, enter **99 – Rest of world**.

#### Option 2: Rotating Shift (Tom Johnson)

##### Work Schedules: Individual Elements (Rotating Shift)

Follow the Customizing steps described below to create a work schedule for a rotating shift. When possible, copy the samples provided in the system, and modify them as required. Finally, assign the generated work schedule, now called the work schedule, to your hourly-wage earner.

### Task 1:

Enter the IMG

1. In the Implementation Guide, choose  
*Personnel Time Management → Work Schedules*

### Task 2:

Check groupings

1. Check to make sure the grouping for work schedules for your personnel subarea **TP## Production ##** is **01**.
2. Check to make sure the grouping for daily work schedules for your personnel subarea **TP## Production ##** is **01**.

*Continued on next page*

### Task 3:

Define a break schedule

1. Create a break schedule called **PW##** with two dynamic unpaid breaks: After **4** hours, employees are entitled to a 15-minute break. After **6** hours, employees are entitled to a 45-minute break. Use the grouping for daily work schedules **01**.

### Task 4:

Define a daily work schedule

1. Define the daily work schedule **EA## (Early ##)**. Copy the daily work schedule **F-11**. Choose the grouping for daily work schedules **01**. Work starts at **05:30**, with a planned working time of 7.75 industry hours (7 hours 45 minutes). Assign the break schedule **PW##** you previously created to the daily work schedule.
2. Define the daily work schedule **LA## (Late ##)**. Copy the daily work schedule **S-11**. Choose the grouping for daily work schedules **01**. Work starts at **2:00 p.m.** (14:00), with a planned working time of 7.75 industry hours (7 hours 45 minutes). Assign the break schedule **PW##** you previously created to the daily work schedule.
3. Define the daily work schedule **NT## (Night ##)**. Copy the daily work schedule **N-11**. Choose the grouping for daily work schedules **01**. Work starts at **10:30 p.m.** (22:30), with a planned working time of 6.25 industry hours (6 hours 15 minutes). Assign the break schedule **PW##** you previously created to the daily work schedule.

### Task 5:

Define a period work schedule

1. Group the daily work schedules **EA##**, **LA##**, **NT##**, and **OFF** into one period work schedule called **WP##**. The work pattern repeats itself every three weeks. You can simply copy three weeks of an existing period work schedule. Choose the grouping for daily work schedules **01**.
2. Enter the following data for each week:  
  
Week 1: Employees work from Day 1 to Day 5 according to the daily work schedule **EA##**; Day 6 and Day 7 are days off. Week 2: Employees work from Day 1 to Day 5 according to the daily work schedule **LA##**; Day 6 and Day 7 are days off. Week 3: Employees work from Day 1 to Day 4 according to the daily work schedule **NT##**; and Day 5, Day 6, and Day 7 are days off.

*Continued on next page*



## Task 6:

Check selection rule for day types

1. Your employees are required to work on public holidays. Check the selection rule **02**. This rule will be referenced later in the work schedule rule.

## Task 7:

Define the work schedule rule **AW##**

1. In the Implementation Guide, choose  
***Personnel Time Management** → **Work Schedules** → **Work Schedule Rules and Work Schedules***  
and carry out the steps in sequence.
2. Check employee subgroup grouping  
Check the employee subgroup grouping. Make sure that an employee subgroup grouping already exists for your hourly-wage earners.
3. Check public holiday calendar  
Check the public holiday calendar assigned to the personnel subarea **TP##**  
**Production ##**.
4. Define a work schedule rule  
Define the work schedule rule **AW##**. Copy the work schedule rule **M3-1**. Use the employee subgroup grouping *Hourly-wage earners* and the public holiday calendar assigned to your personnel subarea **TP##**, as well as the personnel subarea grouping for work schedules **01**.  
Copy the rule for day types **02**.  
Use your period work schedule **WP##** and check the reference date and starting point.

## Task 8:

Generate work schedule for rotating shift

1. Generate the work schedule **AW##** for a period of three years. As a start date, choose the December of the previous year, and as an end date the January of the current year plus 3.

## Task 9:

Assign work schedule

1. Assign the generated work schedule to your hourly-wage earner in the *Planned Working Time* infotype, starting the first of this month.

## Solution 4: Creating Work Schedules (2)

### Task 1:

Enter the IMG

1. In the Implementation Guide, choose  
*Personnel Time Management → Work Schedules*
  - a) In the Implementation Guide, choose *Personnel Time Management → Work Schedules*.

### Task 2:

Check groupings

1. Check to make sure the grouping for work schedules for your personnel subarea **TP## Production ##** is **01**.
  - a) Choose the menu path:  
*Personnel Time Management → Work Schedules → Personnel Subarea Groupings → Group Personnel Subareas for the Work Schedule*  
  
The grouping for work schedules for your personnel subarea **TP##** must be **01**.
2. Check to make sure the grouping for daily work schedules for your personnel subarea **TP## Production ##** is **01**.
  - a) Choose the menu path:  
*Personnel Time Management → Work Schedules → Personnel Subarea Groupings → Group Personnel Subareas for the Daily Work Schedule*  
  
The personnel subarea grouping for daily work schedules **01** must be assigned to the above personnel subarea grouping for work schedules. Check to make sure that this assignment already exists.

*Continued on next page*

### Task 3:

Define a break schedule

1. Create a break schedule called **PW##** with two dynamic unpaid breaks: After **4** hours, employees are entitled to a 15-minute break. After **6** hours, employees are entitled to a 45-minute break. Use the grouping for daily work schedules **01**.

- a) Choose the menu path:

***Personnel Time Management → Work Schedules → Daily Work Schedules → Define Break Schedules.***

In the subsequent dialog box, choose (double-click) the **Determine Break Schedules** activity.

Copy an existing break schedule or choose the *New entries* option.

Because your break schedule consists of two breaks, you need two lines.

Use the grouping for daily work schedule **01** and call your break schedule **PW##**. Number the rows of your break schedule from **01** to **02**. In the *Unpaid* column, enter the duration of each break in industrial hours (decimals), and in the *After* column, enter how many hours the employee must work before he or she is entitled to the break. In the first line, enter a duration of **0.25** after **4** hours, and in the second line, enter a duration of **0.75** after **6** hours.

Save your entries.

### Task 4:

Define a daily work schedule

1. Define the daily work schedule **EA## (Early ##)**. Copy the daily work schedule **F-11**. Choose the grouping for daily work schedules **01**. Work starts at **05:30**, with a planned working time of 7.75 industry hours (7 hours 45 minutes). Assign the break schedule **PW##** you previously created to the daily work schedule.

- a) Choose the menu path:

***Personnel Time Management → Work Schedules → Daily Work Schedules → Define Daily Work Schedules.***

Select and copy the **F-11** entry and name it **EA## (Early ##)**. Use the personnel subarea grouping for daily work schedules **01**. Modify the planned working time as follows: **Planned working hours: 7.75**; industry hours (7 hours 45 minutes); start of **planned working time: 05:30**. Assign the break schedule **PW##** you previously created to the daily work schedule.

*Continued on next page*

2. Define the daily work schedule **LA## (Late ##)**. Copy the daily work schedule **S-11**. Choose the grouping for daily work schedules **01**. Work starts at **2:00 p.m.** (14:00), with a planned working time of 7.75 industry hours (7 hours 45 minutes). Assign the break schedule **PW##** you previously created to the daily work schedule.
  - a) Select and copy the entry **S-11** and name it **LA## (Late ##)**. Use the personnel subarea grouping for daily work schedules **01**. Modify the planned working time as follows: **Planned working hours: 7.75**; industry hours (7 hours 45 minutes); start of **planned working time: 14:00**. Assign the break schedule **PW##** you previously created to the daily work schedule.
3. Define the daily work schedule **NT## (Night ##)**. Copy the daily work schedule **N-11**. Choose the grouping for daily work schedules **01**. Work starts at **10:30 p.m.** (22:30), with a planned working time of 6.25 industry hours (6 hours 15 minutes). Assign the break schedule **PW##** you previously created to the daily work schedule.
  - a) Select and copy the entry **N-11** and name it **NT## (Night ##)**. Use the personnel subarea grouping for daily work schedules **01**. Modify the planned working time as follows: **Planned working hours: 6.25**; industry hours (6 hours 15 minutes); start of **planned working time: 22:30**. Assign the break schedule **PW##** you previously created to the daily work schedule.

## Task 5:

Define a period work schedule

1. Group the daily work schedules **EA##**, **LA##**, **NT##**, and **OFF** into one period work schedule called **WP##**. The work pattern repeats itself every three weeks. You can simply copy three weeks of an existing period work schedule. Choose the grouping for daily work schedules **01**.
  - a) Choose the menu path:  
***Personnel Time Management → Work Schedules → Period Work Schedules → Define Period Work Schedules.***  
  
 Select and copy one of the existing period work schedules. Name your new period work schedule **WP##** (## = your group number) and enter a description of your choice. Because the work pattern repeats itself every three weeks, copy three lines. Use the personnel subarea grouping for daily work schedules **01**.
2. Enter the following data for each week:

*Continued on next page*

Week 1: Employees work from Day 1 to Day 5 according to the daily work schedule **EA##**; Day 6 and Day 7 are days off. Week 2: Employees work from Day 1 to Day 5 according to the daily work schedule **LA##**; Day 6 and Day 7 are days off. Week 3: Employees work from Day 1 to Day 4 according to the daily work schedule **NT##**; and Day 5, Day 6, and Day 7 are days off.

- a) For days **01** to **05** of Week 1, enter the daily work schedule **EA##**, and the daily work schedule **OFF** for days **06** and **07**.

For days **01** to **05** of Week 2, enter the daily work schedule **LA##**, and the daily work schedule **OFF** for days **06** and **07**.

For days **01** to **05** of Week 3, enter the daily work schedule **NT##**, and the daily work schedule **OFF** for days **06** and **07**.

## Task 6:

Check selection rule for day types

1. Your employees are required to work on public holidays. Check the selection rule **02**. This rule will be referenced later in the work schedule rule.

- a) Choose the menu path:

***Personnel Time Management → Work Schedules → Day Types → Define Selection Rules.***

Check the selection rule **02**. It will be referenced again in the work schedule rule. Your employees must also work on public holidays.

Rule		Weekday	Saturday	Sunday
	With holiday class	b123456789	b123456789	b123456789
02	Gives day type			

## Task 7:

Define the work schedule rule **AW##**

1. In the Implementation Guide, choose

***Personnel Time Management → Work Schedules → Work Schedule Rules and Work Schedules***

and carry out the steps in sequence.

- a) Choose the menu path:

***Personnel Time Management → Work Schedules → Work Schedule Rules and Work Schedules***

*Continued on next page*

## 2. Check employee subgroup grouping

Check the employee subgroup grouping. Make sure that an employee subgroup grouping already exists for your hourly-wage earners.

## a) Choose the menu path:

***Personnel Time Management → Work Schedules → Work Schedule Rules and Work Schedules → Define Employee Subgroup Grouping***

To do so, choose → ***Define Employee Subgroup Grouping***. Check whether an employee subgroup grouping for the work schedule exists for hourly-wage earners.

Choose → ***Group Employee Subgroups for Work Schedules***. Check whether the above employee subgroup grouping is already assigned to your employee subgroup *Hourly wage earners* (X1) for work schedules.

## 3. Check public holiday calendar

Check the public holiday calendar assigned to the personnel subarea **TP## Production ##**.

## a) Choose the menu path:

***Personnel Time Management → Work Schedules → Work Schedule Rules and Work Schedules → Define Groupings for the Public Holiday Calendar***

Check whether a public holiday calendar is already assigned to your personnel subarea **TP##**. Use the following public holiday calendar:

99
----

## 4. Define a work schedule rule

Define the work schedule rule **AW##**. Copy the work schedule rule **M3-1**. Use the employee subgroup grouping *Hourly-wage earners* and the public holiday calendar assigned to your personnel subarea **TP##**, as well as the personnel subarea grouping for work schedules **01**.

Copy the rule for day types **02**.

*Continued on next page*

Use your period work schedule **WP##** and check the reference date and starting point.

- a) Choose the menu path:

***Personnel Time Management → Work Schedule Rules and Work Schedules → Set Work Schedule Rules and Work Schedules***

Select and copy an existing entry for hourly-wage earners. Using the employee subgroup grouping 1, the public holiday calendar assigned to your personnel subarea, and the personnel subarea grouping for work schedule 01. Use *AW##* (*##* = your group number) for the work schedule rule and enter an appropriate name.

**Note:**

If the work schedule you have copied has any entry in the *Alternative work schedule rule* field in the *Reduced work* area, delete this entry before saving your work schedule rule.

- b) Copy the rule for day types **02**.
- c) Use the period work schedule **WP##** and enter it in the corresponding field. Choose **January 1, 1990**, as the reference date (or another Monday), and **001** as the starting point. Enter the data in the appropriate fields. Save your entries.

*Continued on next page*

## Task 8:

Generate work schedule for rotating shift

1. Generate the work schedule **AW##** for a period of three years. As a start date, choose the December of the previous year, and as an end date the January of the current year plus 3.
  - a) Generate work schedule **AW##** for rotating shift

Choose **Personnel Time Management** → **Work Schedules** → **Work Schedule Rules and Work Schedules** → **Generate Work Schedules Manually**

Enter the following values in the entry screen for the work schedule:

Employee subgroup grouping	1
Public holiday calendar	Public holiday calendar for your personnel subarea (99)
Personnel subarea grouping	01
Work schedule rule	AW##
Calendar month from	December of previous year (in number format)
Calendar month to	January (of current year + 3) (in number format)

### Note:

The instructor may announce a different generation period

Choose the *Create all* option, or choose **Edit** → **Create all** from the menu.

*Continued on next page*



## Task 9:

Assign work schedule

1. Assign the generated work schedule to your hourly-wage earner in the *Planned Working Time* infotype, starting the first of this month.
  - a) Open a new session (choose **System** → **Create session**) and then choose from the menu: **Human Resources** → **Time Management** → **Administration** → **Time Data** → **Maintain**.

For your hourly-wage earner with the personnel number **306991##**, complete the following steps: Enter **Planned Working Time** (0007) in the *Infotype* field.

Choose *Create* or *Edit* → *Create* from the menu. Enter the first of the current month as the valid from date.

Enter the work schedule rule **AW##**.

Choose *Enter* to confirm the warning that appears and then save your entries.



## Lesson Summary

You should now be able to:

- Set up the individual elements of work schedules
- Generate and assign a work schedule



## Unit Summary

You should now be able to:

- Describe the characteristics of public holidays
- Describe the structure of the public holiday calendar
- Understand the relevance of public holidays for payment and attendance/absence counting
- Set up the individual elements of work schedules
- Generate and assign a work schedule





## Test Your Knowledge

1. The public holiday calendar that is valid for an employee depends upon the personnel area/subarea to which the employee is assigned.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

2. A work schedule in the SAP system contains the following elements:

*Choose the correct answer(s).*

- ☐ A Weekly schedule
- ☐ B Break schedule
- ☐ C Work schedule rule
- ☐ D Daily work schedule
- ☐ E Night work schedule
- ☐ F Period work schedule



## Answers

1. The public holiday calendar that is valid for an employee depends upon the personnel area/subarea to which the employee is assigned.

**Answer:** True

A public holiday calendar has to be assigned in Customizing to each personnel area/personnel subarea. In master data maintenance, each employee is assigned to a personnel area/personnel subarea, which thereby assigns him or her to a public holiday calendar.

2. A work schedule in the SAP system contains the following elements:

**Answer:** B, C, D, F

A work schedule is made up of break schedules, daily work schedules and period work schedules, which are consolidated in a work schedule rule.

# Unit 5

## Part-Time Workforce

### Unit Overview

In this unit, you learn about the options available for creating part-time work models.



### Unit Objectives

After completing this unit, you will be able to:

- Create and assign part-time work schedules

### Unit Contents

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Exercise 5: Set Up Part-Time Work Models .....	127

## Lesson: Part-Time Workforce and Working Time Models

### Lesson Overview

In this lesson, you learn how to represent part-time models in the system.



### Lesson Objectives

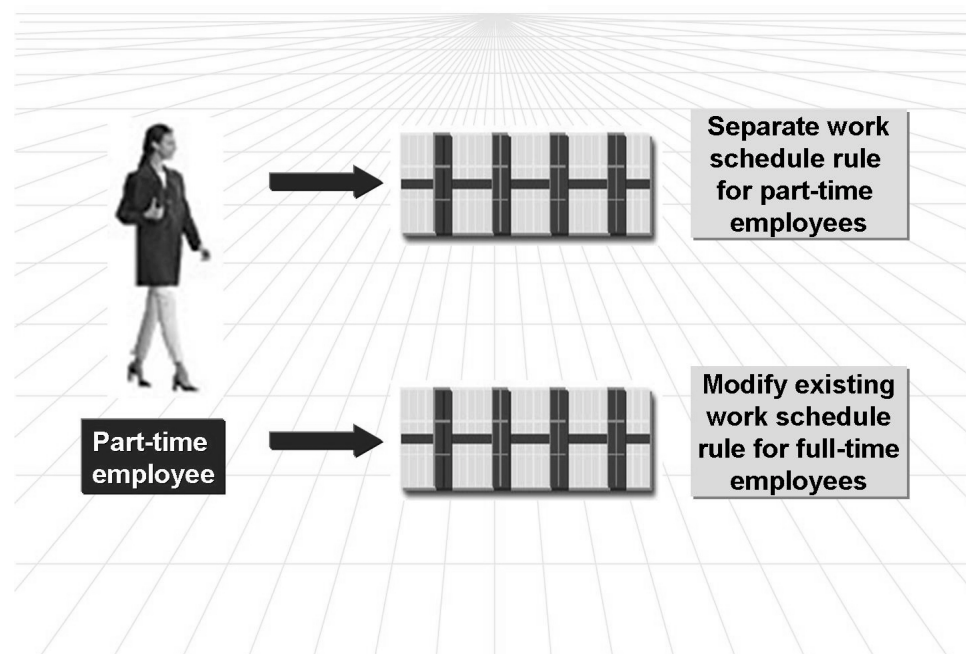
After completing this lesson, you will be able to:

- Create and assign part-time work schedules

### Business Example

- Your company employs part-time workers as well as full-time employees.
- In this lesson, you will learn about two options available for creating part-time work models.

## Part-Time Workforce and Working Time Models



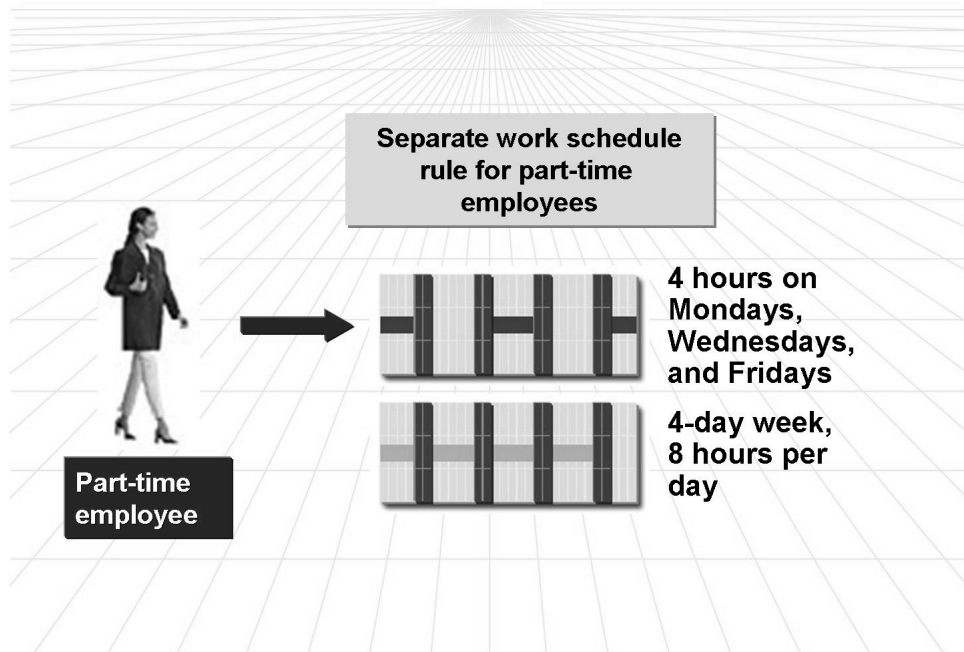
**Figure 66: Part-Time Workforce: Planned Working Time**

Companies frequently employ part-time employees. Numerous part-time working schedules exist, and they vary widely according to enterprise and industry.

Part-time working provisions can be set up in the SAP system in two different ways.



You can set up your own work schedule rules for your part-time employees, or you can use the work schedule rules that exist for your full-time workforce.



**Figure 67: Part-Time Work Schedule: Separate Work Schedule Rules**

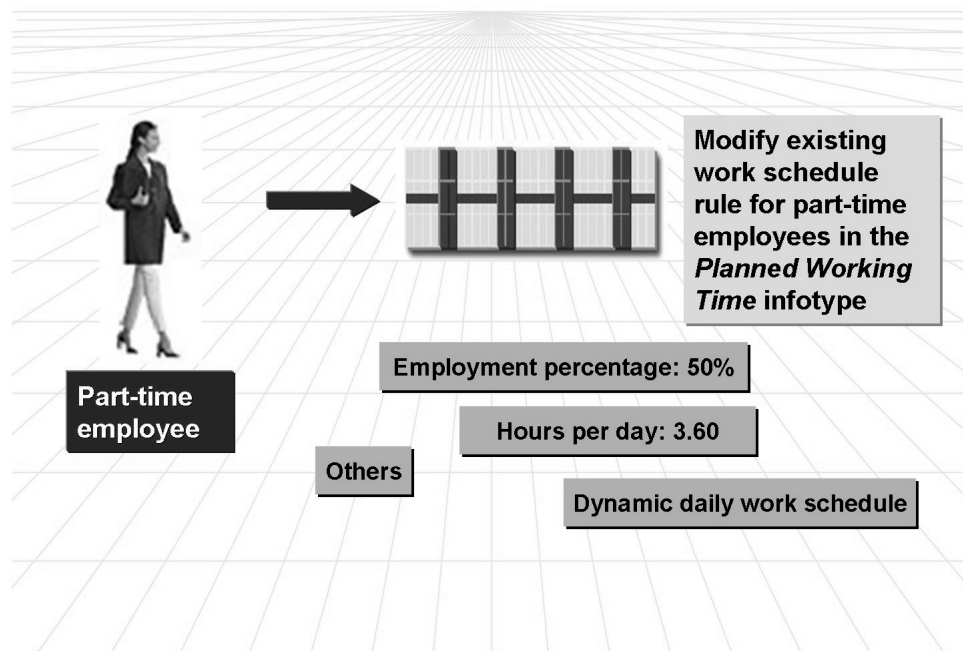
If you want to create a separate work schedule rule for a part-time employee, you proceed exactly as you did for creating work schedule rules for your full-time employees. A work schedule rule for your part-time workforce can be used for all employees who are to work according to this rule.

This means that you must follow all of the required steps, such as setting up daily work schedules, period work schedules, work schedule rules, and so on in the Implementation Guide (IMG). In addition, you have to generate a work schedule from these elements and then assign it to your part-time employees in the *Planned Working Time* infotype (0007).

You can define the shortened working time in the daily work schedule by specifying fewer planned working hours (4 instead of 8, for example).

Alternatively, you may have employees who have the same daily work schedules as your full-time employees. However, they work fewer days in the week. You can then group the daily work schedules into an applicable period work schedule (3-day working week instead of 5, for example).

Both part-time scenarios can also be combined. It is possible that part-time employees work fewer hours each day and fewer days as full-time employees.



**Figure 68: Part-Time Work Schedule: Modifying Infotype 0007**

If you want to specify a part-time rule based on a full-time work schedule rule, you have to modify the average working hours in the existing daily work schedule in the *Planned Working Time* infotype (0007) for each applicable employee.

To do so, you can set the employment percentage, the working hours per day, week, month, or year to a lower value. Using the function for creating daily work schedules dynamically, you are able to specify variable working times for part-time employees in your enterprise.



**Create Planned Working Time**

Work schedule

Work schedule rule: FLEX  
Time Mgmt status: No time eval.  
☒ Part-time employee

Working time

Employment percent	50.00
Daily working hours	3.60
Weekly working hours	18.00
Monthly working hrs	76.24
Annual working hours	939.60
Weekly workdays	5.00

☒ Dynamic daily work schedule

Average working hours for full-time employees (employment percentage = 100%)

Employment percent	100.00
Daily working hours	7.20
Weekly working hours	36.00
Monthly working hrs	156.48
Annual working hours	1879.20
Weekly workdays	5.00

Employment percentage 50 %  
Default average working hours from work schedule are adjusted

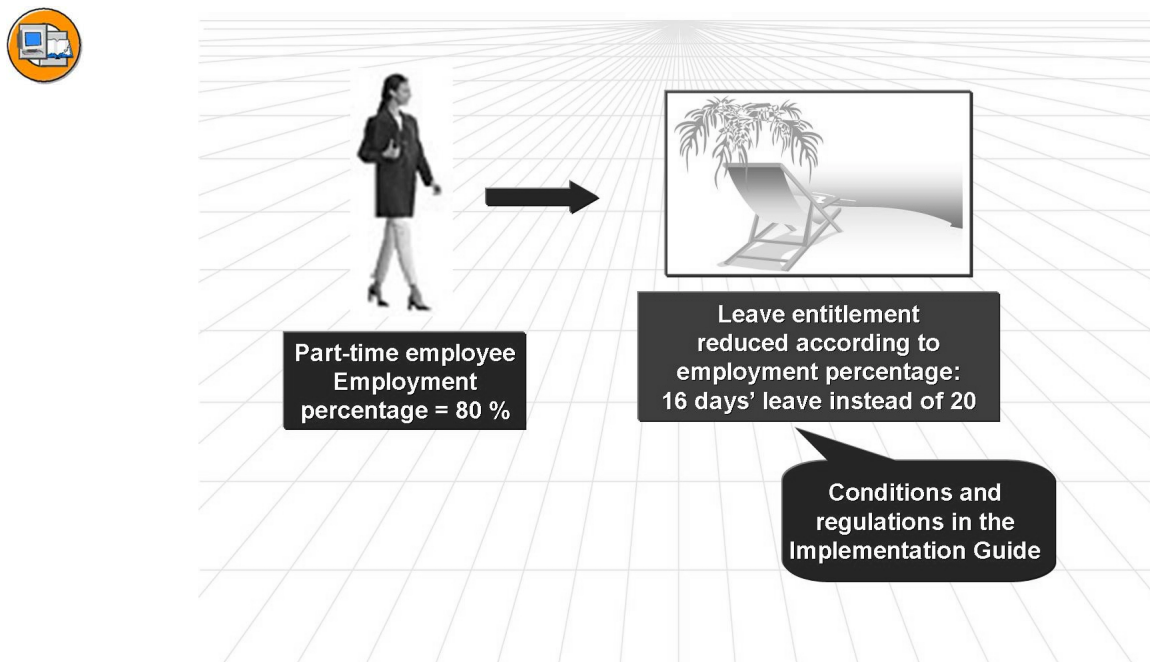
**Figure 69: Part-Time Work Schedule: Modifying Infotype 0007 (cont'd)**

If you want to specify a part-time rule based on a full-time work schedule rule, you must do so for each employee individually. To do so, you change the average working hours of the full-time work schedule rule in the *Planned Working Time* infotype (0007) in one of the fields in the *Working time* section of the screen. Note: You can customize which of the hours fields are ready for input. In the standard system, only the daily working hours field is active.

The fields that you can overwrite are: employment percentage, daily working hours, weekly working hours, monthly working hours, and annual working hours. You only have to overwrite one field and the others are automatically adjusted.

As soon as the employment percentage is less than 100%, the *Part-time employee* field becomes activated. Furthermore, the personal work schedule for the employee is modified accordingly to reflect the part-time working hours.

Part-time work can also be specified in the *Planned Working Time* infotype (0007) using the dynamic daily work schedule function. In this way, you can overwrite specific fields of the daily work schedule for part-time employees according to the specifications in the *Planned Working Time* infotype (0007).



**Figure 70: Part-Time Workforce: Modifying Leave**

If quota entitlements such as leave also need to be reduced for part-time employees, you can also create the required reduction rules with the necessary conditions in the IMG.

You can modify the leave entitlement according to the employment percentage for your part-time employees in the *Planned Working Time* infotype (0007). Another option would be to modify the capacity utilization level in the *Basic Pay* infotype (0008) or weekly workdays, for example.

## Exercise 5: Set Up Part-Time Work Models

### Exercise Objectives

After completing this exercise, you will be able to:

- Set up an individual part-time work schedule

### Business Example

Some employees at the your company work part-time. For many of these part-time employees, the part-time work schedule is set up individually by modifying the existing work schedule rule.

### Task:

Set up an individual part-time work schedule for an employee

1. Modify the working time in the *Planned Working Time* infotype (0007) for your hourly-wage earner starting the first of the month after next, so that he has a part-time employment percentage of **50%**.

## Solution 5: Set Up Part-Time Work Models

### Task:

Set up an individual part-time work schedule for an employee

1. Modify the working time in the *Planned Working Time* infotype (0007) for your hourly-wage earner starting the first of the month after next, so that he has a part-time employment percentage of **50%**.

- a) Choose *Human Resources* → *Time Management* → *Administration* → *Time Data* → *Maintain*.

Enter the personnel number of your hourly-wage earner **306991##** (## = your group number) and then call up the *Planned Working Time* infotype (0007). Choose the *Copy* button, or *Edit* → *Copy* from the menu.

In the subsequent screen, enter the first day of the month after next as the start date.

In the *Employment percent* field, enter **50%** and confirm the subsequent warnings by choosing *Enter*.

The ***Part-time*** and ***Dynamic daily work schedule*** options are automatically set. Check how the employee's working times have changed.

Save your data.



## Lesson Summary

You should now be able to:

- Create and assign part-time work schedules



## Unit Summary

You should now be able to:

- Create and assign part-time work schedules





## Test Your Knowledge

1. A separate work schedule rule must be entered for each part-time model.  
*Determine whether this statement is true or false.*
  - ☐ True
  - ☐ False



## Answers

1. A separate work schedule rule must be entered for each part-time model.

**Answer:** False

You can represent part-time models based on a full-time work schedule rule by adjusting the employment percentage in the *Planned Working Time* infotype (0007).

# Unit 6

## Time Data Recording and Administration

### Unit Overview

In this unit, you learn how to configure time data recording and specify how you want the system to react when time infotypes collide.



### Unit Objectives

After completing this unit, you will be able to:

- Customize time recording and administration
- Determine how the system reacts to collisions between time infotypes

### Unit Contents

Lesson: Time Data Recording and Administration .....	134
Exercise 6: Set Up Attendance and Absence Types .....	151

## Lesson: Time Data Recording and Administration

### Lesson Overview

In this lesson, you customize time data administration and collision checks.



### Lesson Objectives

After completing this lesson, you will be able to:

- Customize time recording and administration
- Determine how the system reacts to collisions between time infotypes

### Business Example

- Employees at your enterprise work according to the times specified in their work schedules. However, deviations can occur. Employees call in sick, go on vacations, fill in for other employees, work overtime, and so on.
- To record these deviations in the system and to deduct them from the applicable entitlements, you have to make specific Customizing settings.

### Overview

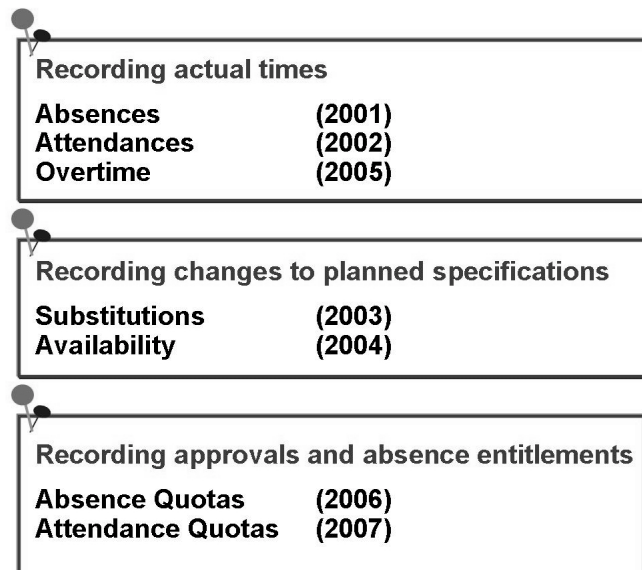
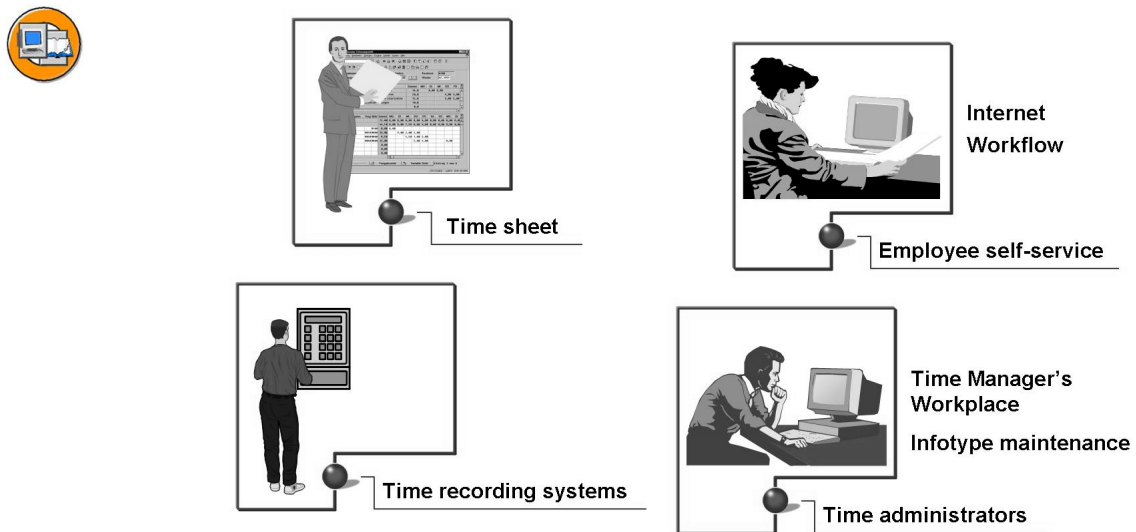


Figure 71: Overview of Time Infotypes

Planned specifications for an employee's working time are stored in the *Planned Working Time* infotype (0007). However, there are often changes to the specified working times, for example, if an employee works overtime, does not come to work (due to illness, for example), attends a seminar, or works different times than usual. In addition, employees are entitled to vacation and possibly further training.

This and other information is stored in infotypes in Time Management. The information from these time infotypes can be transferred and processed further in time evaluation and payroll, as required.



**Figure 72: Time Recording Options**

With SAP Time Management, you can use various systems and methods for recording time and labor data, such as actual times worked, business trips, leave, or substitutions:

Online entry by time administrators

Front-end time recording systems

SAP Cross-Application Time Sheet

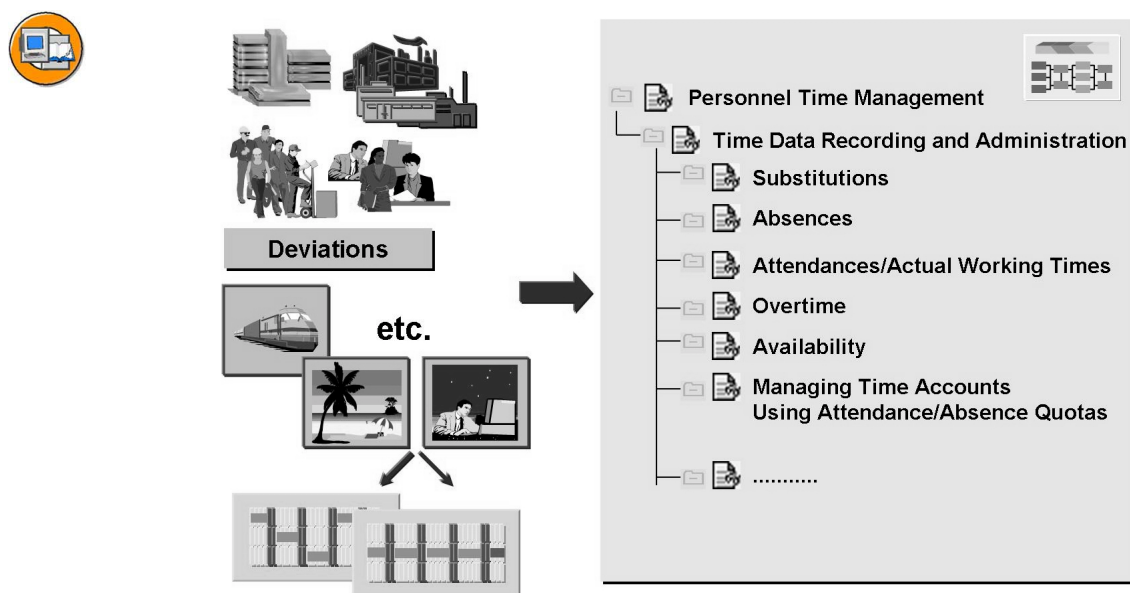
Self-service applications such as Internet applications, Workflow forms, or touch-screen systems

Customer-specific systems with an interface to SAP R/3

Time data is stored in time infotypes. Time administrators can use various options to record time data:

The Time Manager's Workplace (TMW) was developed specifically for decentralized time administrators; it provides a user interface to optimize the recording and maintaining of time data for these administrators. Time data is entered using intuitive time data IDs, but is still stored in the applicable time infotypes.

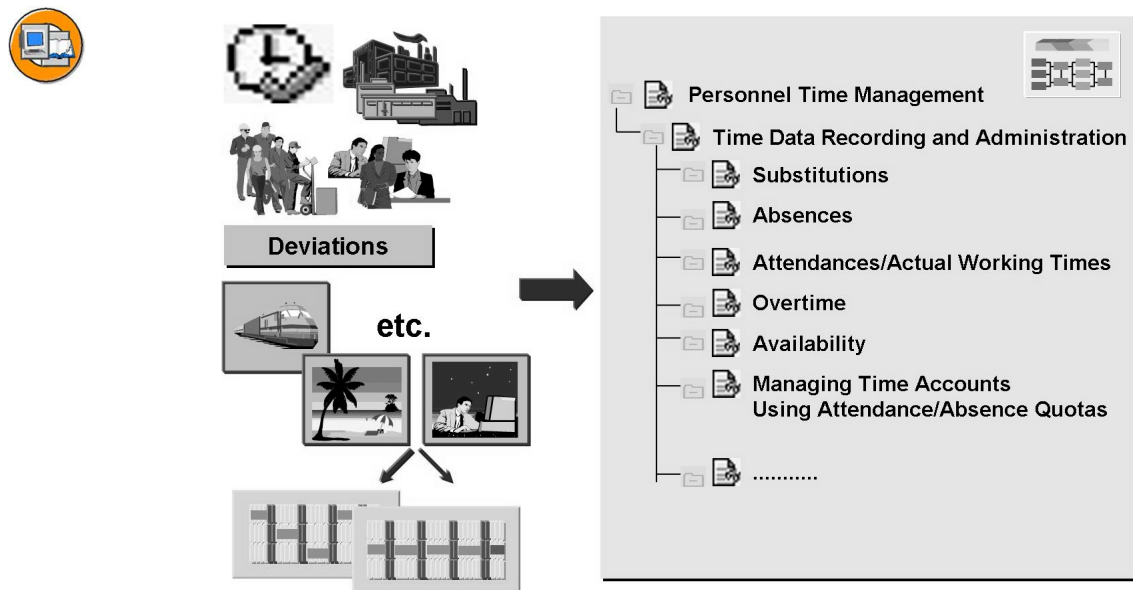
The following entry options are available if you maintain time data directly in the infotypes: **single screen**, in which you maintain one infotype record for one employee; **fast entry**, in which you maintain one infotype record for several employees at one time; and **list entry**, in which you maintain several infotype records for one employee.



**Figure 73: Setting Up Deviations in Time Recording**

To ensure that various deviations in working time are efficiently recorded at your company, you must first check the corresponding settings in the Implementation Guide (IMG) and modify them, if necessary.

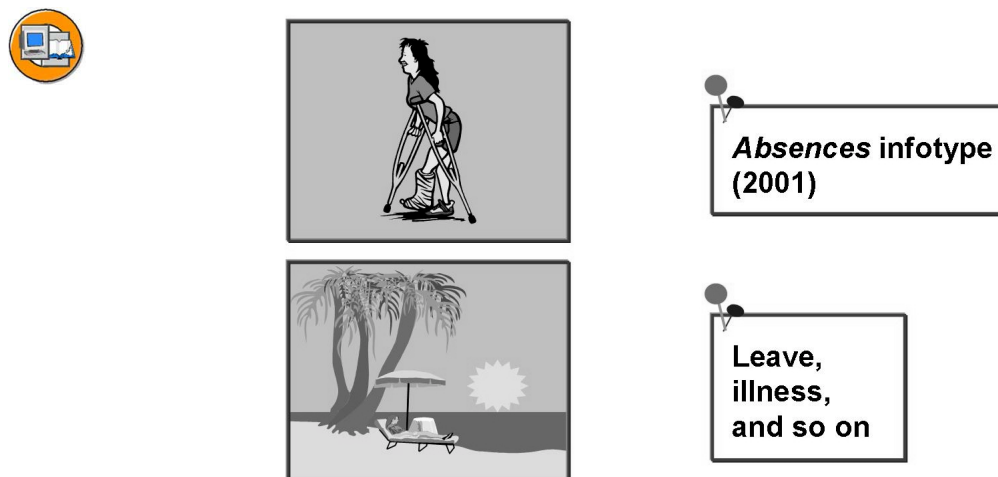
To set up deviations, complete the Customizing steps in the *Time Data Recording and Administration* section of the IMG for Personnel Time Management.



**Figure 74: Setting Up Absences**

The Implementation Guide (IMG) contains samples of absence types.

To set up absence types, complete the Customizing steps under *Personnel Time Management* → *Time Data Recording and Administration* → *Absences*.



**Figure 75: Absences**

Absences (such as leave or illness) can be classified as paid or unpaid.

Absences are recorded in the *Absences* infotype (2001) and are defined further by an absence type (subtype).

The IMG contains an absence catalog with samples that you can copy and modify for your own use.

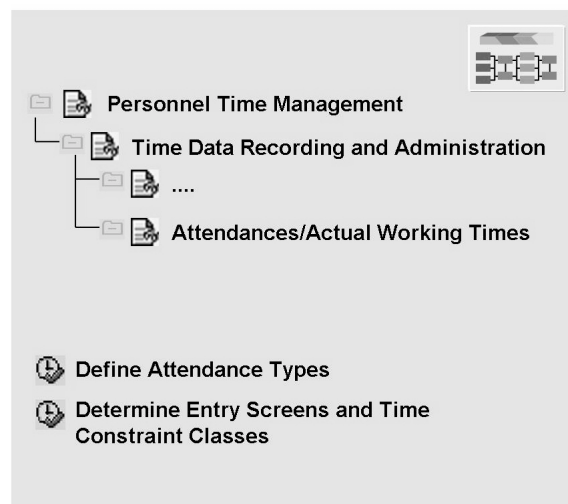
Absence types are dependent upon the personnel subarea grouping for attendances and absences. You need several groupings only if you use different attendance and/or absence types for different personnel subareas and you want to restrict their use in different personnel subareas.

Furthermore, you can determine which input checks the system carries out when an absence is recorded. These include system reactions on days off, as well as the limiting of absences to a certain number of days or only part of a day.

Because the individual absence types contain different types of information, the system uses a separate entry screen to record each absence in the *Absences* infotype (2001).

Each absence type is assigned a time constraint class that is referenced during the collision check for existing time types.

Absences are counted using counting rules, and valuated in payroll or time evaluation.



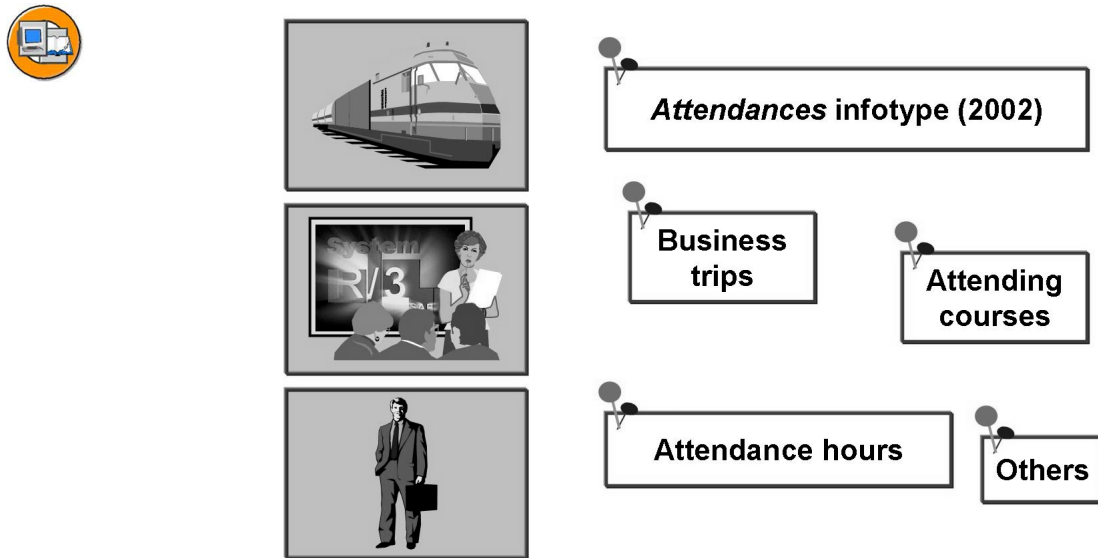
**Figure 76: Setting Up Attendances**

The IMG contains samples of attendance types.

To set up attendance types, complete the Customizing steps under *Personnel Time Management* → *Time Data Recording and Administration* → *Attendances*.

Attendance types are created in the same way as absence types.





**Figure 77: Attendances**

Attendances recorded in the *Attendances* infotype (2002) describe the employee's work schedule or provide additional information. Using this infotype, you can store an employee's working hours, attendance at training courses, and overtime, for example. If you do not use time recording systems in your enterprise, you can use it to record employees' actual times.

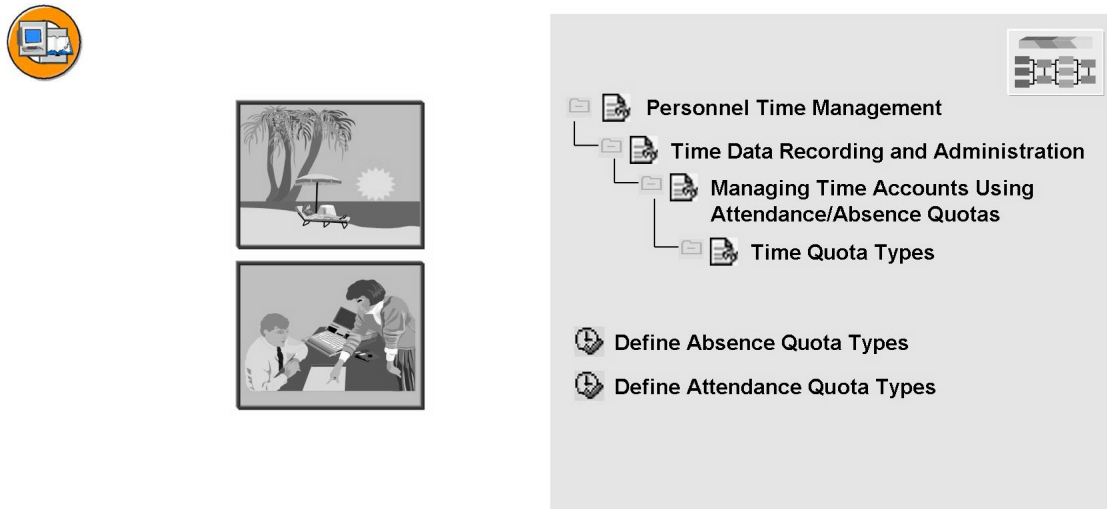
You can assign the attendances recorded in this infotype to a cost center that differs from the master cost center.

Another example of an attendance is a business trip. The employee is not working at the usual workplace, but he or she is still working for the company during the trip.

Attendances are recorded in the *Attendances* infotype (2002) and are defined further by an attendance type (subtype).

**Note:**

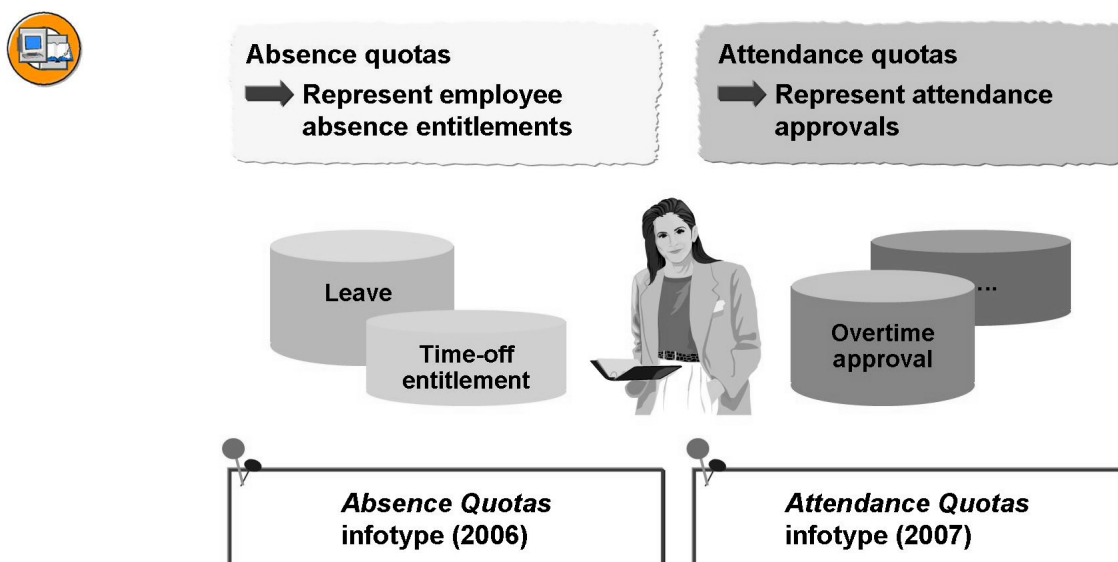
Attendances are set up in the Implementation Guide in the same way as absences.



**Figure 78: Creating Attendance/Absence Quotas**

The IMG contains samples of absence and attendance quotas.

The corresponding Customizing steps for setting up attendance and absence quotas are located in the IMG for Personnel Time Management under *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Time Quota Types*. For absence quotas, select the *Define Absence Quota Types* activity and for attendance quotas the *Define Attendance Quota Types* activity.



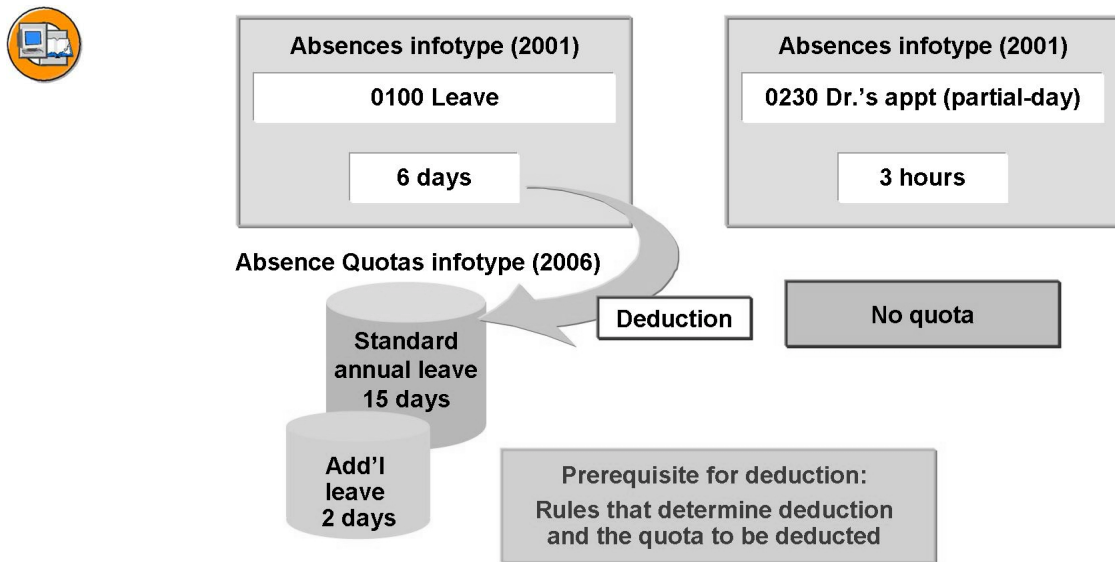
**Figure 79: Attendance and Absence Quotas**

Employees in your enterprise are entitled to leave, additional training, and so on. These types of entitlements can be stored in quotas, from which attendances and absences are deducted.

You set up employees' absence entitlements, such as standard annual leave, educational leave, and non-working shift entitlement, in the *Absence Quotas* infotype (2006) .

You set up approvals for special attendances (such as overtime approvals) in the *Attendance Quotas* infotype (2007). These approvals can be queried in time evaluation.

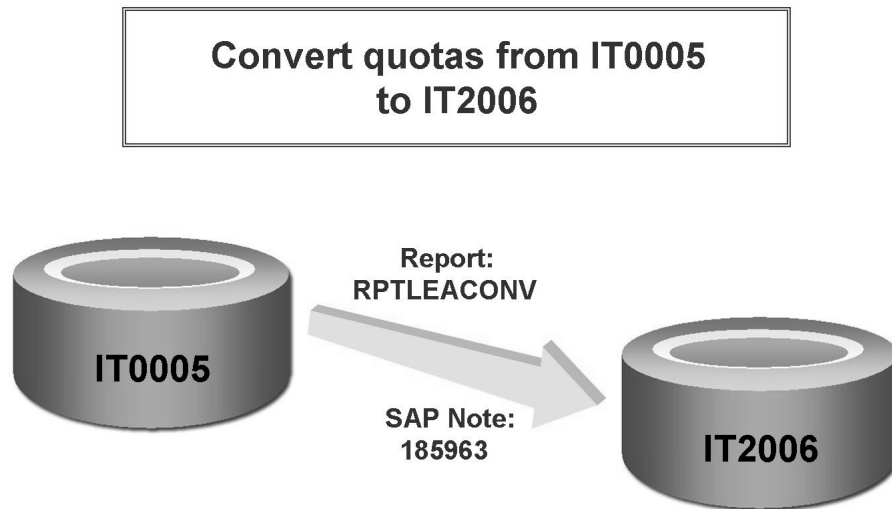
An absence quota is an employee's time-limited entitlement to an absence. Similarly, an attendance quota is an employee's time-limited entitlement to an attendance. Attendance quota types and absence quota types are used to represent these entitlements in the system.



**Figure 80: Absence Quotas**

Attendances and absences can be deducted from quotas, but do not have to be.

If attendances and absences are deducted from quotas, you must specify from which quotas and in which sequence.



**Figure 81: Converting Absence Quotas**

You can currently manage your employee's leave entitlements using the *Leave Entitlement* infotype (0005) or the *Absence Quotas* infotype (2006).

The *Absence Quotas* infotype (2006) offers more functions and flexibility for accruing, managing, and deducting from leave entitlements compared with the *Leave Entitlement* infotype (0005).

To simplify the conversion to quotas, you can use the RPTLEACONV report, which enables you to transfer your employees' remaining leave from the *Leave Entitlement* infotype (0005) to absence quotas in the *Absence Quotas* infotype (2006).

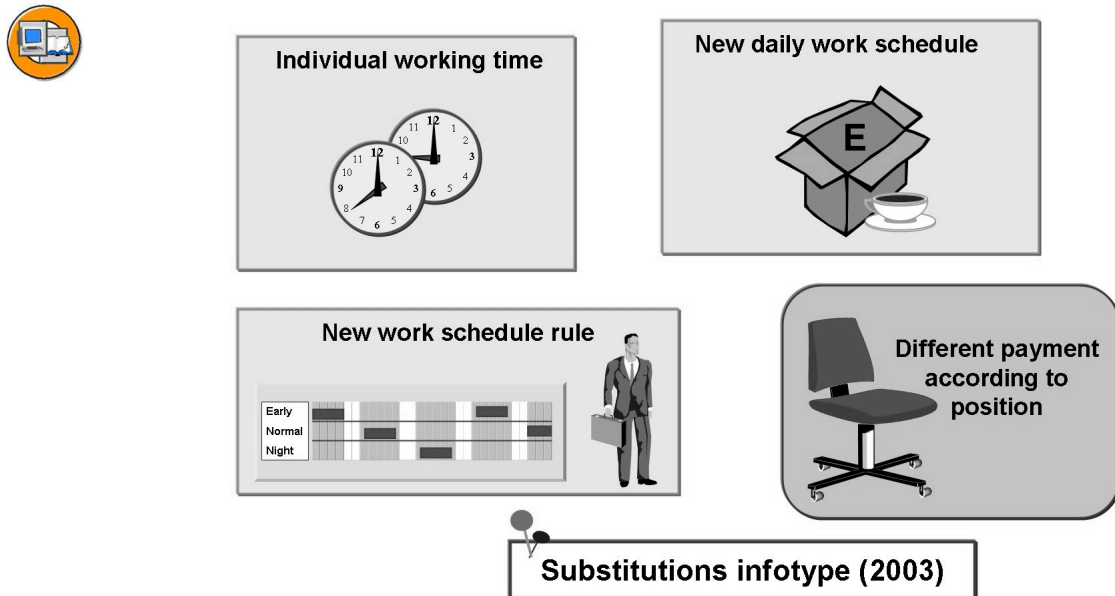
To do so, you enter in table T559J (Convert Leave Types to Quota Types) which leave types you want to transfer to which absence quota types, taking into account the applicable employee subgroup groupings and personnel subarea groupings.

You maintain table T559J via the V\_T559J view.

We recommend that you use absence quotas to manage your employees' leave entitlements in the future, because although the *Leave Entitlement* infotype (0005) remains available, it will not be developed further.

The RPTLEACONV report was shipped via Support Packages as of Release 4.5B. For detailed documentation, access the report in the transaction SA38 and choose *Goto → Documentation*.

For related SAP Notes, see: 366686, 312911, 381856



**Figure 82: Substitutions**

A substitution occurs when an employee has to carry out activities that require a different working time or payment from that stipulated in his or her work schedule. Substitutions are recorded in the *Substitutions* infotype (2003). The following substitution types are conceivable:

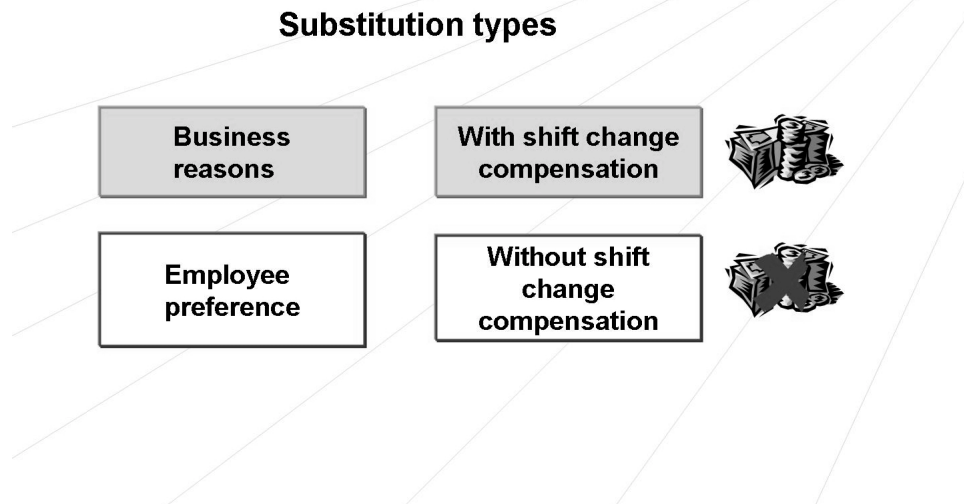
**Individual working time:** This substitution is recommended for changes to planned working time that cannot be represented in daily work schedules or work schedules. You enter clock times to indicate the start and end of working time. The original planned working time is overwritten.

**New daily work schedule:** This substitution is recommended for daily changes to planned working time. It replaces the employee's original planned working time.

**New work schedule rule:** This substitution is recommended for longer-term changes to planned working time. Here you can also assign the work schedule rule of an employee to be substituted by entering his or her personnel number. The system then applies the work schedule of the other employee. The original planned working time is overwritten.

**Different payment:** This substitution permits a different payment by substituting a different position that has different pay. The planned working time is not overwritten here, unless you combine this substitution with one of the other substitutions.

You can record a different payment (premium, different pay scale group, and so on) for a substitution. You can also assign the substitution either to a cost center that deviates from the master cost center or an order.



**Figure 83: Substitutions: Leveling By Substitution Type**

You can set up various types of substitutions (foreman substitutions, shift substitutions, and so on).

Substitution types can also be used for different payments. Depending on the substitution type, you can determine if a bonus or other type of compensation applies.

The following are examples of the different uses for various substitution types:

Substitution type **01 = Employee preference** (employee voluntarily substitutes for a night shift)

Substitution type **02 = Business reason** (employee is assigned this substitution)

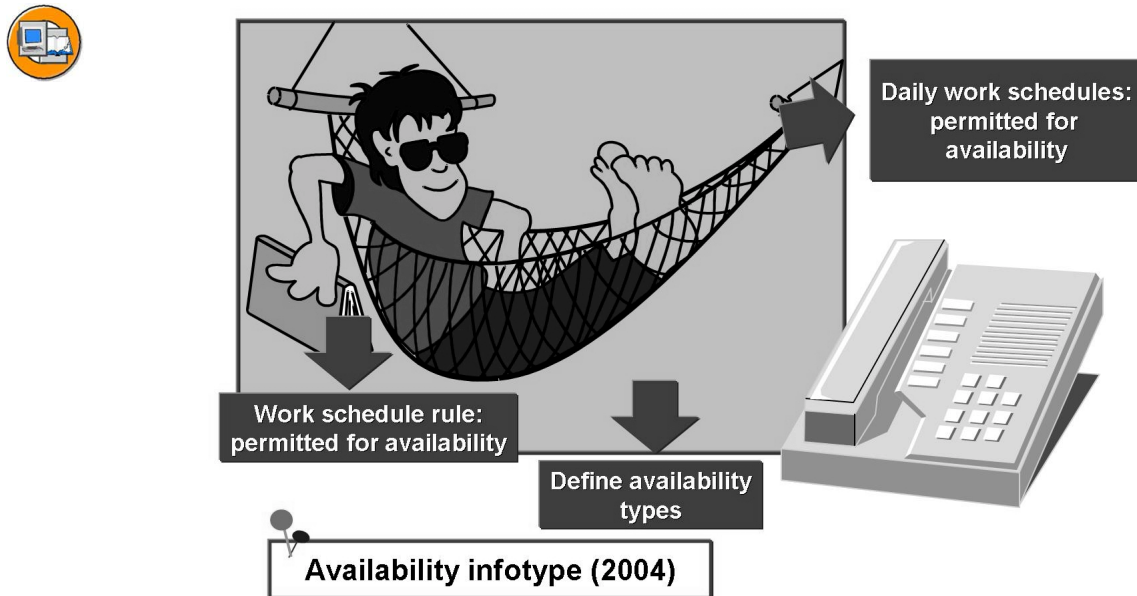
Shift change compensation can be set up to be paid only for business reasons (substitution type 02).

When setting up the substitution type in the IMG, you can specify if compensation for a shift change is usually paid or not.

This can also be queried in schema XT00 in payroll.

**Note:**

Note: You can use the **VTART** feature to define a default substitution type.



**Figure 84: Availability**

Availabilities are stored in the *Availability* infotype (2004). Various types of availability can be maintained. They take place in fixed periods.

Availability can be specified by clock times, a daily work schedule, or a work schedule rule. The daily work schedule and the work schedule rule must be permitted for use in availabilities.

Before setting up availabilities, you must first set up the assignment of groupings for availability types (and substitution types) for the personnel areas/subareas.

The standard system uses only grouping **01**.

Additional groupings are required only if different availability types (and substitution types) are used in several different personnel areas/subareas.

**Example:**

The personnel subareas **0001** and **0002** use the same availability types. The personnel subarea **0003**, on the other hand, uses different availability types.

You must then define the availability types required for these groupings in your enterprise. The time constraint class for collisions with other time infotypes must be checked.

Finally, the daily work schedules and work schedule rules permitted for availabilities must be indicated.



Hours worked in addition to  
normal working time

**Figure 85: Overtime**

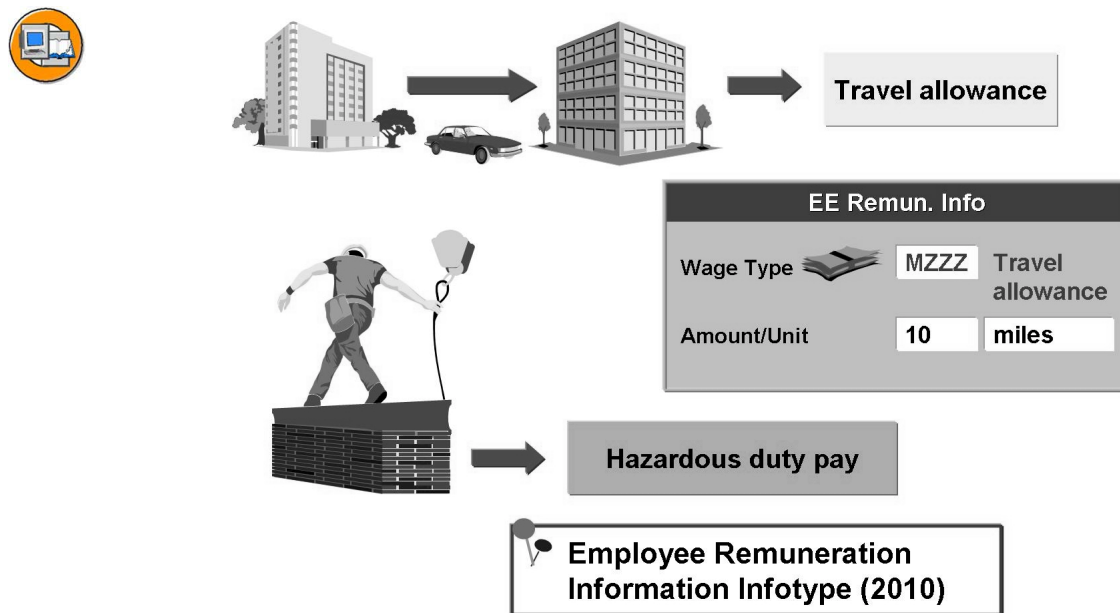
Overtime is hours that an employee works in addition to the planned working time defined in his or her daily work schedule. Overtime can be recorded using the *Attendances* infotype (2002) or *Overtime* infotype (2005) if you only want to record deviations to the work schedule.

You use the overtime compensation type to determine whether the overtime is paid, or compensated by time off. The overtime compensation types are located in the *Attendances* infotype (2002) and the *Overtime* infotype (2005). You can record a different payment (premium, different pay scale group, and so on) for the overtime entered. You can also assign the overtime to a cost center that deviates from the master cost center or an order. You can only enter activity allocation data in the *Attendances* infotype (2002).

**Note:** The *Overtime* infotype is not available in the Time Manager's Workplace.

If you use time evaluation in your enterprise, overtime is automatically calculated from the complete actual times. In time evaluation, you can process various forms of overtime determination (daily, weekly), and approval (for specific employees, according to work schedules, general).





**Figure 86: EE remun. info**

You can use the *Employee Remuneration Information* infotype (2010) to store manually calculated wage amounts, hazardous duty payments, and other wage types that cannot be planned. These wage types cannot be automatically generated in payroll and must therefore be recorded manually. Values determined in the remuneration information are transferred directly to payroll.

The *EE Remuneration Info* infotype (2010) relates to a key date, that is, a validity date, not a validity interval. If the key date is within a certain payroll period, remuneration takes place in this same period.

The wage types used for employee remuneration information are located in the IMG and can be customized to suit your requirements.

**Example:**

An employee must drive from one plant location to another with his or her own private car. The employee is therefore entitled to a travel allowance. You can enter the allowance in the *EE Remuneration Info* infotype (2010) and assign it an appropriate wage type.



**Figure 87: Different payment**

You can record different compensation for certain employee time data.

When you record time data (such as attendances, overtime, absences, and availability), you can enter the following specifications for different payment:

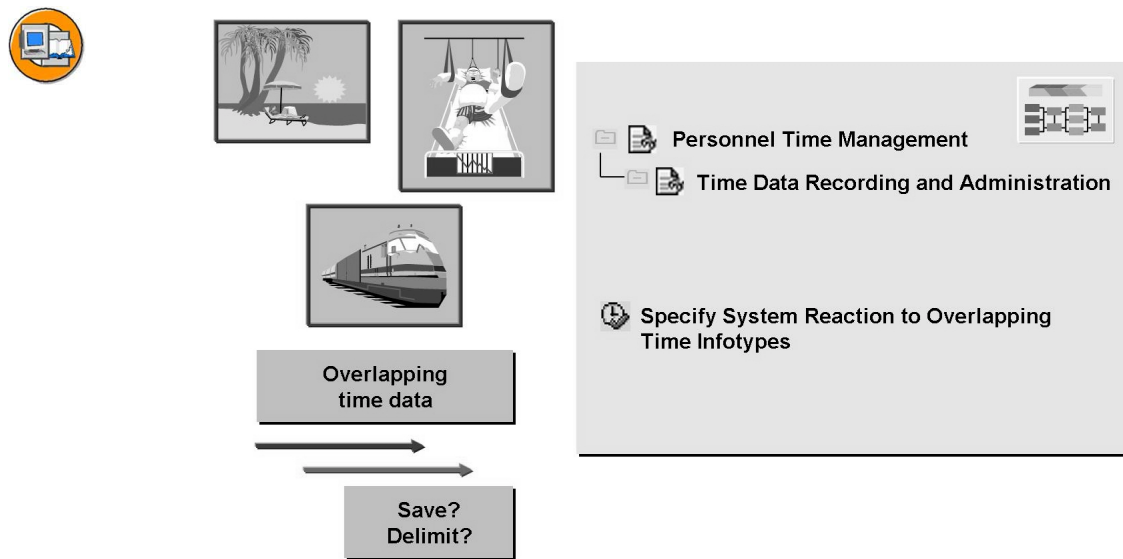
Bonus (premium) as supplemental remuneration

Determine a different compensation using a pay-scale assignment (deviating from the employee's regular pay scale)

Compensation using a position (position-based payment)

Bonus or deduction of concrete amounts using the extra pay indicator and the valuation basis.

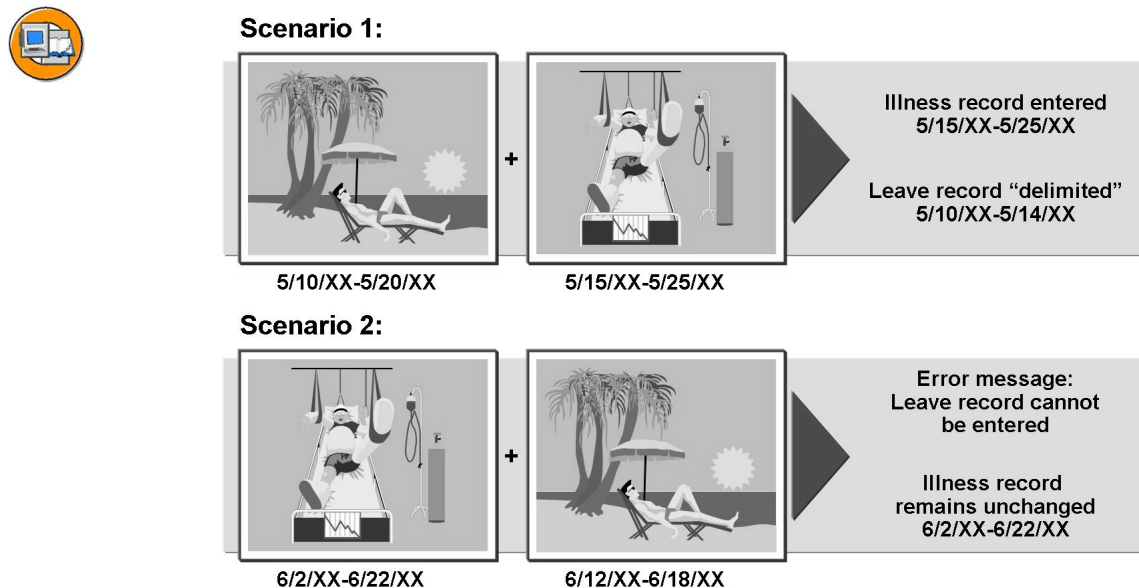
You can assign employee time data to a cost center other than the master cost center.



**Figure 88: Overlapping Time Infotypes**

The system reacts in various ways when time infotypes collide.

These system reactions are controlled by the time constraint class.

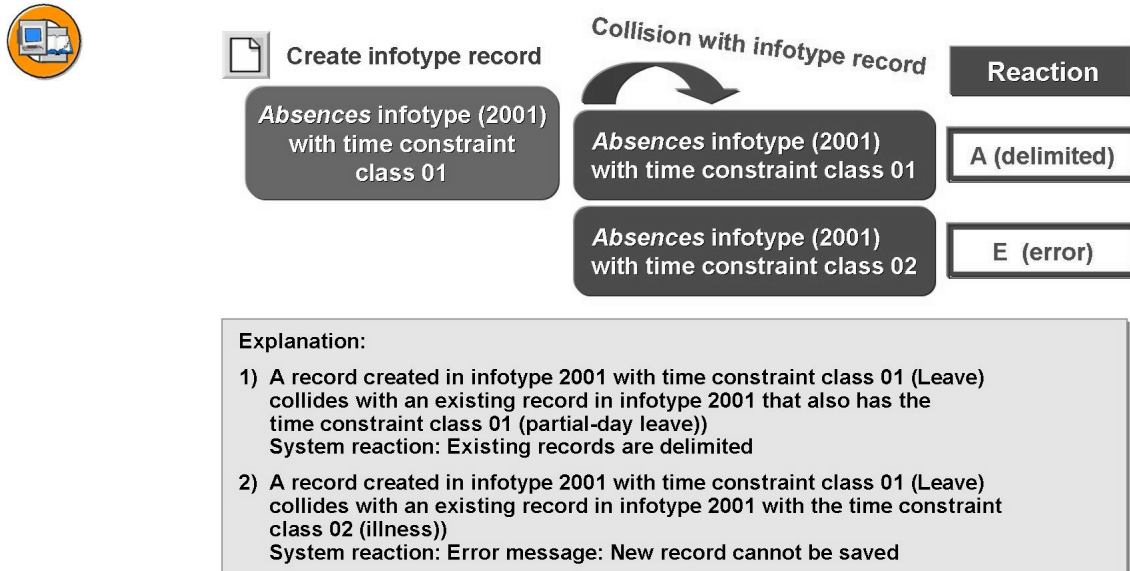


**Figure 89: Collision Checks**

When time data is recorded, data records frequently overlap one another. These overlaps are called collisions in the SAP R/3 System.

When you enter a new time data record, the system checks whether other records for this employee have been recorded for the same time period. Collision checks prevent data records that conflict with one another from co-existing in the system.

When collisions occur, the system reacts by issuing an error message, a warning, or by delimiting the old record.



**Figure 90: System Reaction to Colliding Time Infotypes**

Collision checks reference the time restraint classes of time recording data.

Possible time constraint reactions to collisions when recording an infotype are:

**A** The existing record is delimited and the new record created.

The system issues a message.

**E** The new record cannot be added.

The system issues an error message.

**W** A new record is created; the existing record is not changed.

The system issues a warning message.

**N** A new record is created; the existing record is not changed.

The system does not issue a warning message.

## Exercise 6: Set Up Attendance and Absence Types

### Exercise Objectives

After completing this exercise, you will be able to:

- Configure absence types

### Business Example

You create attendance and absence types for your enterprise by copying and modifying the samples provided in the standard system.



**Hint:** If the system asks you to enter a country grouping, enter **99 – Rest of world**.

### Task:

Configuring Absence Types

1. Check the appropriate groupings.
2. Create the absence type **LE##** and call it **Leave Group ##**. To do so, copy the absence type **0100 (Leave)**.

If the start and end of the absence are designated as a non-working period, you want the administrator to receive a warning message. If the entire period is a non-working period, you want the administrator to receive an error message.

You do not want any restrictions as to the maximum duration for the absence type.

## Solution 6: Set Up Attendance and Absence Types

### Task:

#### Configuring Absence Types

1. Check the appropriate groupings.
  - a) In the Implementation Guide (IMG), choose *Personnel Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Group Personnel Subareas for Attendances and Absences*.

Make sure that your personnel subarea **TP##** has the personnel subarea grouping **01**.

2. Create the absence type **LE##** and call it **Leave Group ##**. To do so, copy the absence type **0100 (Leave)**.

If the start and end of the absence are designated as a non-working period, you want the administrator to receive a warning message. If the entire period is a non-working period, you want the administrator to receive an error message.

You do not want any restrictions as to the maximum duration for the absence type.

- a) In the Implementation Guide (IMG), choose *Personnel Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Define Absence Types*.

Select and copy the absence type **0100 (Leave)** for the personnel subarea grouping **01** and call it **LE## Leave group ##** (where ## = your group number).

If the start and end of the absence are designated as a non-working period, you want the administrator to receive a warning message. In the **First day is day off** and **Last day is day off** fields, enter **W** for warning.

If the entire period is a non-working period, you want the administrator to receive an error message. In the **Non-working period** field, enter **E** for error.

Because no restrictions are to be made on the maximum duration of the absence, enter **999** in the **Maximum duration** field. Leave the **Unit** field **blank** for calendar days.

Save your entries.



## Lesson Summary

You should now be able to:

- Customize time recording and administration
- Determine how the system reacts to collisions between time infotypes



## Unit Summary

You should now be able to:

- Customize time recording and administration
- Determine how the system reacts to collisions between time infotypes





## Test Your Knowledge

1. Attendances are entered in infotype 2002.  
*Determine whether this statement is true or false.*
  - ☐ True
  - ☐ False



## Answers

1. Attendances are entered in infotype 2002.

**Answer:** True

Attendances are recorded in the *Attendances* infotype (2002) and are defined more specifically by the attendance type (subtype).

# Unit 7

## Attendance and Absence Counting

### Unit Overview

This unit describes the rules and options for counting attendances and absences.



### Unit Objectives

After completing this unit, you will be able to:

- Set up rules for counting attendances and absences
- Use daily work schedule variants to count absences

### Unit Contents

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## Lesson: Attendance and Absence Counting Rules

### Lesson Overview

In this lesson, you process rules for counting attendances and absences.



### Lesson Objectives

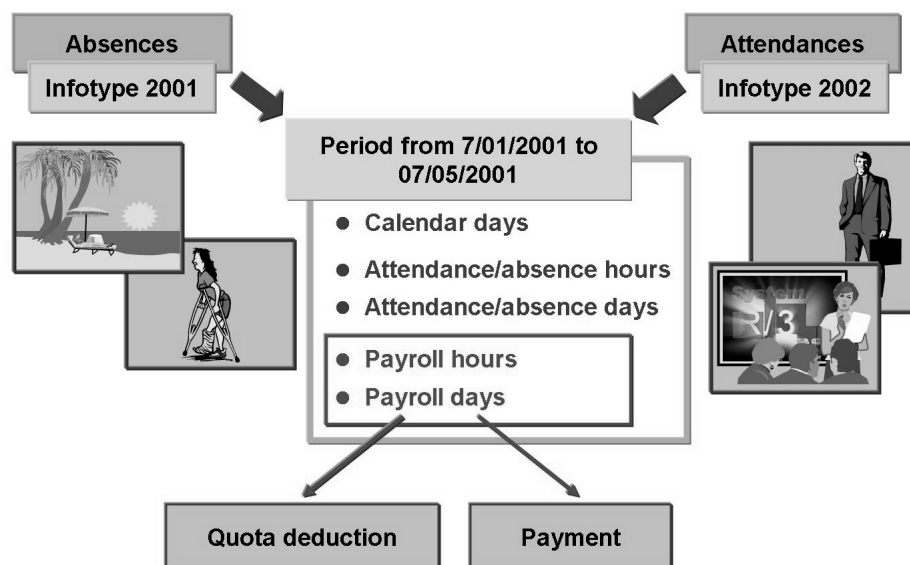
After completing this lesson, you will be able to:

- Set up rules for counting attendances and absences

### Business Example

Attendances and absences must be recorded for your company's employees. Employees call in sick, go on vacation, participate in training courses, or go on business trips.

### Introduction



**Figure 91: Introduction:**

To calculate the duration of an attendance/absence, the system first references the number of planned hours from the daily work schedule valid for the specific day. However, you may not always want to use this method. You may want special rules to apply for counting the duration of an attendance or absence on certain days, for example, such as public holidays and weekdays, or for certain

attendances and absences or daily and period work schedules. You can therefore use rules to control how the daily duration of an attendance/absence is counted. You can define such rules in the Implementation Guide (IMG).



Field	Value	Description
Absence type	0100 Leave	
Absence hours	12.00	Total number of planned working hours according to work schedule
Absence days	2.00	No. of days with planned working hours > 0
Calendar days	3.00	Number of calendar days in the absence period
Quota used	1.50	Determines payroll days (here days of leave) using a counting rule

**Figure 92: Example: Leave**

The duration of an attendance/absence is calculated in five different types of units in the SAP R/3 System. These units are included in the *Attendances* and *Absences* infotypes:

#### **Calendar days:**

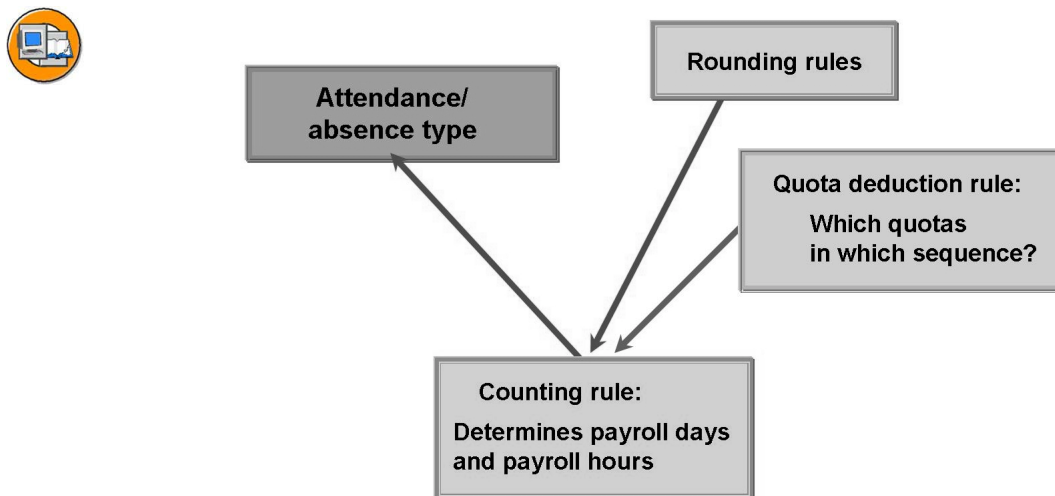
The system calculates calendar days using actual calendar days for the attendance/absence. Partial days are calculated as 0 calendar days.

#### **Attendance/absence hours, attendance/absence days:**

Attendance/absence hours are calculated using the the planned hours specified in the work schedule. In this way, only the days on which the employee had planned hours are included in the calculation.

#### **Payroll hours, payroll days:**

Payroll days and hours are used for deducting quotas and in payroll (number field of a wage type). The calculation of payroll days and hours is controlled by the settings made for attendance/absence counting. In this way, you can also include attendance/absence days in the calculation for days on which the employee did not have any planned hours.



**Figure 93: Overview: Assigning Counting and Quota Deduction Rules**

**Counting rule:**

The rules for counting attendances and absences are used to determine the payroll days and hours of an attendance or absence.

**Rounding rule:**

When attendances and absences are counted, the system may determine values to several decimal places. Because all these decimal places are not normally required for use in quota deduction and in payroll, you can assign a rounding rule to the counting rule to determine how the values are to be rounded.

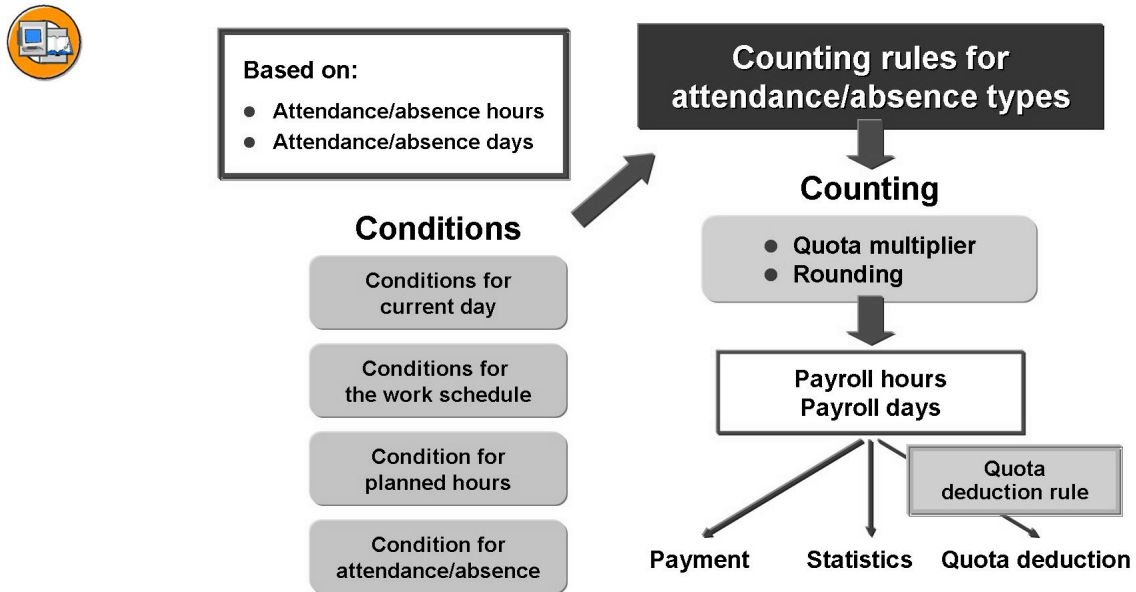
**Deduction rule for quotas:**

The counting rule can also be assigned a deduction rule for quotas, which, in the case of quota deduction, determines which quotas are deducted in which sequence.

**Assigning a counting rule to an attendance/absence type:**

A counting rule must be assigned to each attendance/absence type to ensure that the payroll days and hours are determined for the special attendance/absence.

Furthermore, you must determine whether quota deduction is to be activated for each attendance/absence type. With quota deduction activated, the attendance/absence is deducted from quotas according to the specified quota deduction rules. These quota deduction rules are also assigned to the counting rule.



**Figure 94: Counting Rules for Attendances/Absences**

You define the counting rules for attendances and absences to determine payroll days and hours in Customizing.

The basis for applying the counting rule is the absence days and hours determined by the system. They are calculated using the the planned hours specified in the work schedule.

In a counting rule, you define the following:

Conditions that must be fulfilled for the corresponding counting rule to be used: Conditions for the current day (day of week, public holiday class), conditions for work schedule (classification of daily work schedules and period work schedules), conditions for planned hours ( $\geq 0$ ), conditions for attendances/absences (full-day, partial-day)

Specifications that determine how the payroll days and hours are calculated. Quota multipliers and rounding rules are used in the calculation.

For quota deduction, you can assign quota deduction rules to a counting rule.

A counting rule can consist of several individual rules. These individual rules are distinguished by their sequential number. The system searches through the individual rules until one is met.



**Applicability of rule**

**Conditions for current day**

**Weekday**

<input checked="" type="checkbox"/> Monday	<input checked="" type="checkbox"/> Wednesday	<input checked="" type="checkbox"/> Friday	<input checked="" type="checkbox"/> Sunday
<input checked="" type="checkbox"/> Tuesday	<input checked="" type="checkbox"/> Thursday	<input checked="" type="checkbox"/> Saturday	

**Holiday class**

<input checked="" type="checkbox"/> Not a public holiday
<input checked="" type="checkbox"/> Holiday class 1 - public hol.
<input type="checkbox"/> Holiday class 2 - public hol.
...

**Day type**

<input checked="" type="checkbox"/> Work acc. to work schedule
<input type="checkbox"/> Day type 1: Day off
<input type="checkbox"/> Day type 2: Day off
...

**Figure 95: Conditions for the Current Day**

You can determine on which days a counting rule for absences/attendances is to be valid.

To do so, use the **conditions for the current day**. (The current day is the day to be counted.) In this section of the screen, you select the characteristics the day must have for the counting rule to apply.

Included in these characteristics are the day of the week (Monday to Sunday), the public holiday class (blank, 1 - 9) and the day type (workday or day off).

**Note:**

You can select more than one option within a block. For the rule to be valid, at least one of the options must be selected for the block displayed.



**Conditions for work schedule**

**Counting class period work schedule**

<input checked="" type="checkbox"/> Counting class 0
<input checked="" type="checkbox"/> Counting class 1
<input checked="" type="checkbox"/> Counting class 2
<input checked="" type="checkbox"/> Counting class 3
<input checked="" type="checkbox"/> Counting class 4
...

**Daily work schedule class**

<input checked="" type="checkbox"/> Daily work schedule class 0
<input checked="" type="checkbox"/> Daily work schedule class 1
<input checked="" type="checkbox"/> Daily work schedule class 2
<input checked="" type="checkbox"/> Daily work schedule class 3
<input checked="" type="checkbox"/> Daily work schedule class 4
...

**Figure 96: Conditions for the Work Schedule**

In some cases, you may want to calculate the duration of absences and attendances differently depending on the type of work on that day or the work pattern.



You can determine for which daily work schedules or period work schedules the counting rule to determine payroll days and hours is to apply.

To do so, you can use the **counting classes of the period work schedules** and the **daily work schedule classes**. You can select from the counting classes **0** to **9** for both the daily and period work schedules. Different counting rules can therefore be set up for different daily work schedules as well as different period work schedules.

**Note:**

You assign period work schedules to counting classes in the *Define Counting Classes for the Period Work Schedule* activity in the IMG.

**Note:**

You can select more than one option within a block.



Applicability of rule

Condition for planned hours

☐ Planned hours = 0      ☒ Planned hours > 0

Condition for absence/attendance

☒ < 1 day      ☒ Full-day

**Figure 97: Conditions for Planned Hours and Attendance/Absence**

Furthermore, you can limit the validity of the counting rule according to the **conditions for planned hours** and **conditions for the attendance/absence**.

As a condition for the planned hours from the daily work schedule, you can specify whether the planned hours must be equal to or greater than 0.

As a condition for the attendance/absence, you can specify whether the counting rule is valid for full-day or partial-day attendances/absences.

**Note:**

You can select more than one option within a block.



Counting	
<b>Hours</b>	
Quota multiplier	100.00 %
Rounding rule	01
<input checked="" type="radio"/> Multiply first	
<input type="radio"/> Round first	
<b>Days</b>	
Quota multiplier	100.00 %
Rounding rule	01
<input checked="" type="radio"/> Multiply first	
<input type="radio"/> Round first	

**Figure 98: Controlling Counting**

After you have specified the conditions for applying the counting rule in the previous steps, you can now define how the payroll days and hours (when the conditions apply) are to be calculated.

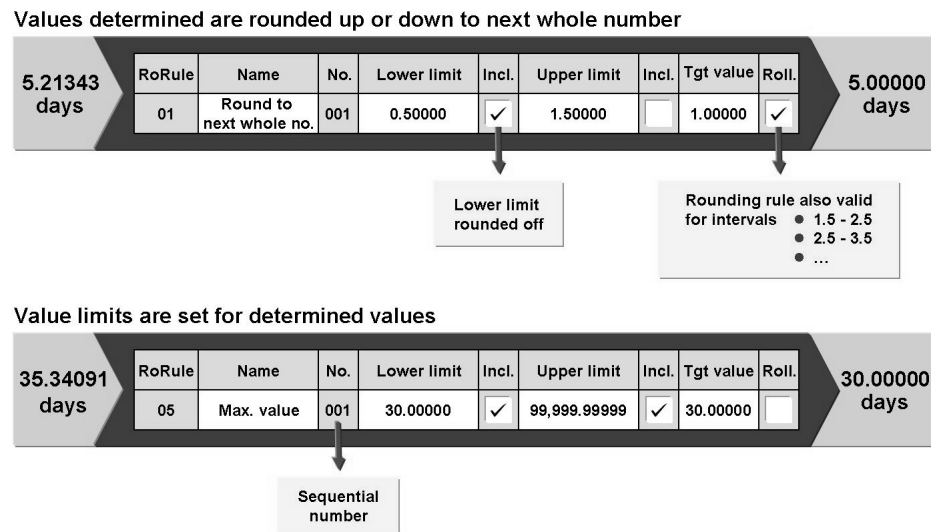
You can specify different criteria for counting payroll days and payroll hours.

In this way, you can enter different quota multipliers for each time unit. A quota multiplier of 100% means that the absence hours (or days) are weighted 100%.

In addition, you can assign the rounding rules defined in the **days** and **hours** sections of the screen.

Finally, you can select whether or not you want to multiply first and then round, or vice versa for both of these areas. In this way, you can decide, for example, when hours are counted whether payroll hours should be determined first, and the result rounded according to the assigned rounding rule, or whether the absence hours are to be rounded, and then the payroll hours are determined. This same applies for counting in days.

**Note:** The **Deduction rule** section is discussed later in this course.



**Figure 99: Rounding Rules**

To count payroll days and hours, you can use rounding rules to round the values determined up or down.

You can define several rounding rules. A rounding rule is uniquely indicated by its 2-digit number and can consist of several complementary subrules. The system runs through the subrules until one is met.

You define an upper and lower limit for the rounding interval in a rounding rule. In the two *Incl.* columns, you activate the switch to specify whether the upper and lower limits are to be included when calculating the interval. You enter the value to which you want to round up or down in the *Target value* column. In the *Roll.* column, you indicate if the interval is to be rolled, that is, copied to all subsequent intervals, by activating the switch. In this case, the duration of the interval is always taken into account.

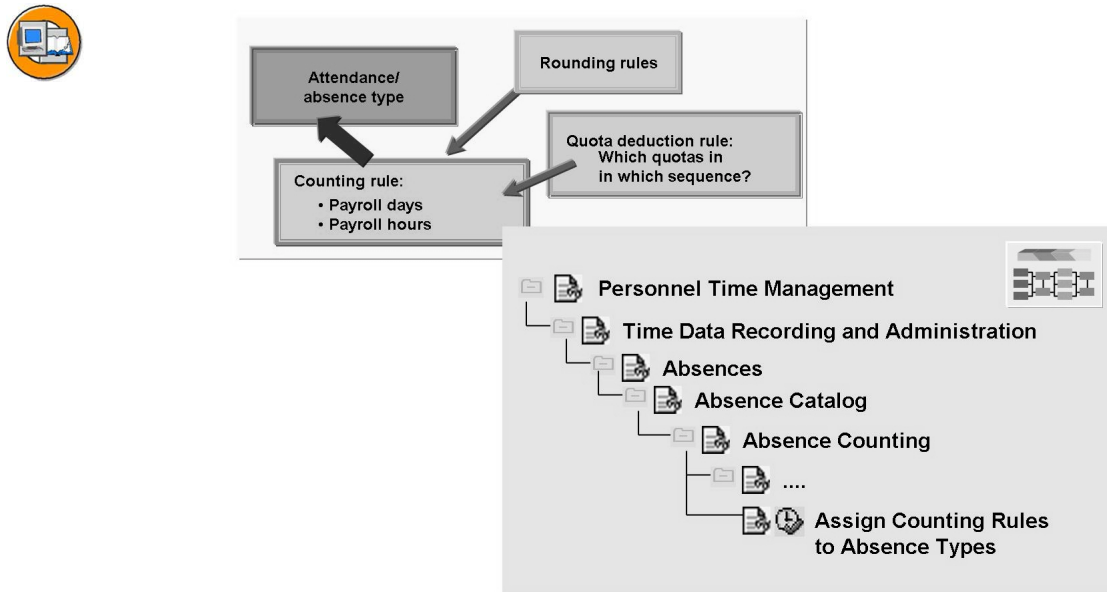
Example:

According to **rounding rule 01**, all values between 0.5 inclusive and 1.5 exclusive are rounded to the target value **1**. The interval is defined as "rolling" here and is thus carried over to the following intervals.

The rounding rules can be assigned in the counting rules.

**Note:**

Rounding rules can also be used elsewhere, for example, to determine how absence entitlements are rounded.



**Figure 100: Assigning Counting Rules to Attendance/Absence Types (1)**

You have to assign a counting rule to each attendance and absence type so that durations of attendances and absences are also calculated by the counting rules.

Furthermore, you must determine whether the quota deduction function is to be activated for each attendance and absence type.

The relevant Customizing activities are under *Personnel Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Absence Counting* and, similarly, under *Attendances* → *Attendance Counting* in the IMG.

The screenshot shows the SAP configuration screen for assigning counting rules. It includes the following fields and options:

- PS grouping:** 01
- A/A type text:** 0100 Leave
- From:** 01/01/1990
- To:** 12/31/9999
- Counting/Quota deduction section:**
  - Counting rule:** 010
  - ☒ Quota deduction
  - ☐ Deduction over interval end

**Figure 101: Assigning Counting Rules to Attendance/Absence Types (2)**

In the **Counting/quota deduction** section of the screen, you select the counting rule for the corresponding attendance or absence type.

You also activate quota deduction if you want the corresponding attendance/absence type to be deducted from quotas in the *Absence Quotas* infotype (2006) and the *Attendance Quotas* infotype (2007).

**Example:**

The absence type **Leave (0100)** references the counting rule **010** to calculate durations. This absence type, in turn, can be assigned the rounding rules and deduction rules of the quota types that are to be deducted by this absence type.

Quota deduction is activated in this case. In this way, a deduction is made from the existing quotas according to the quota deduction rule assigned to counting rule **010**.



## Exercise 7: Set Up Counting Rules

### Exercise Objectives

After completing this exercise, you will be able to:

- Create counting rules for attendance and absences

### Business Example

Attendances and absences must be recorded for your company. Employees call in sick, go on vacation, participate in training courses, or go on business trips. You create counting rules to determine the payroll days and hours for attendances and absences. You assign these counting rules to the applicable attendance and absence types.



**Hint:** If the system asks you to enter a country grouping, enter **99 – Rest of world**.

### Task:

#### Attendance and Absence Counting

For the payroll days and hours to be assigned correctly, you must assign a counting rule to this absence type.

1. **Define a counting class for the period work schedule**

Specify a counting class of a period work schedule of your choice for your newly created period work schedule.

2. **Define a counting rule**

Define a counting rule with two subrules to be used for your absence type *LE##*.

First check the relevant personnel subarea and employee subgroup groupings.

Your personnel subarea *TP##* should be assigned to the personnel subarea grouping for time quotas **01**.

The applicable employee subgroups should be assigned to the employee subgroup grouping for time quotas **1**.

For these groupings, create counting rule **1##** (## = your group number) and name it *Counting rule group ##*. Create two subrules, 001 and 002.

**Apply the following specifications to subrule 001:**

The absence is to be counted on all seven days of the week.

*Continued on next page*

The public holiday class of the day must not be 2, that is, the rule applies on all days except half-day holidays.

The absence is counted only if the day is a workday according to the work schedule.

Counting occurs for all period work schedules and all daily work schedules.

The rule applies only to days with planned hours greater than zero and to full-day and partial-day absences.

Hours and days are to be counted as whole amounts (100%).

Hours and days are rounded to the next whole number. Choose and assign a suitable rounding rule.

Absence hours and days are to be multiplied first by the quota multiplier before the values determined for payroll days and hours are rounded.

Do not yet enter any quota deduction rules in the *Deduction rule* section. You will do this in the next unit.

**Apply the following specifications to subrule 002:**

For subrule 002, use subrule 001 with the following changes:

You want a new counting approach to apply to days that have the public holiday class **2** (that is, half-day holidays). You want only half of these days to be counted.

However, a different rounding rule is to be assigned for counting. Values determined for hours and days are to be rounded to two decimal places. Use rounding rule **04** here.

Assign the applicable rounding rule in the *Hours* and *Days* sections of the screen. You also want to calculate the values first and then round them.

For days with the public holiday class **2**, however, counting occurs as follows:

Hours are to be counted as their full amount. Full-days are to be valued as half-days.

Use the rounding rule specified above.

**3. Assign a counting rule to an absence type**

Assign the counting rule **1##** to the absence type **LE##**. Check if quota deduction for the absence type **LE##** is already activated.

**Note:** Creating quotas and quota deduction are covered in the next unit.



## Solution 7: Set Up Counting Rules

### Task:

#### Attendance and Absence Counting

For the payroll days and hours to be assigned correctly, you must assign a counting rule to this absence type.

#### 1. Define a counting class for the period work schedule

Specify a counting class of a period work schedule of your choice for your newly created period work schedule.

##### a) Define a counting rule for the period work schedule

Because the counting class of the period work schedule is queried in the counting rules, you must make an entry for your newly created period work schedule in the applicable Customizing view.

In the Implementation Guide (IMG), choose *Personnel Time Management → Time Data Recording and Administration → Absences → Absence Catalog → Absence Counting → Define Counting Classes for the Period Work Schedule*.

Select and **copy a suitable entry**, and in the *Period work schedule* field, enter your previously created period work schedule *PZ## (WP##)*. Make sure that you copy the correct personnel subarea grouping (**01**). In the *Counting class* field, enter any counting class (between *blank* and *9*). Save your entries.

#### 2. Define a counting rule

Define a counting rule with two subrules to be used for your absence type *LE##*.

First check the relevant personnel subarea and employee subgroup groupings.

Your personnel subarea *TP##* should be assigned to the personnel subarea grouping for time quotas **01**.

The applicable employee subgroups should be assigned to the employee subgroup grouping for time quotas **1**.

For these groupings, create counting rule **1##** (## = your group number) and name it *Counting rule group ##*. Create two subrules, 001 and 002.

##### Apply the following specifications to subrule 001:

The absence is to be counted on all seven days of the week.

The public holiday class of the day must not be 2, that is, the rule applies on all days except half-day holidays.

*Continued on next page*

The absence is counted only if the day is a workday according to the work schedule.

Counting occurs for all period work schedules and all daily work schedules.

The rule applies only to days with planned hours greater than zero and to full-day and partial-day absences.

Hours and days are to be counted as whole amounts (100%).

Hours and days are rounded to the next whole number. Choose and assign a suitable rounding rule.

Absence hours and days are to be multiplied first by the quota multiplier before the values determined for payroll days and hours are rounded.

Do not yet enter any quota deduction rules in the *Deduction rule* section. You will do this in the next unit.

**Apply the following specifications to subrule 002:**

For subrule 002, use subrule 001 with the following changes:

You want a new counting approach to apply to days that have the public holiday class **2** (that is, half-day holidays). You want only half of these days to be counted.

However, a different rounding rule is to be assigned for counting. Values determined for hours and days are to be rounded to two decimal places. Use rounding rule **04** here.

Assign the applicable rounding rule in the *Hours* and *Days* sections of the screen. You also want to calculate the values first and then round them.

For days with the public holiday class **2**, however, counting occurs as follows:

Hours are to be counted as their full amount. Full-days are to be valued as half-days.

Use the rounding rule specified above.

**a) Define a counting rule**

In the Implementation Guide (IMG), choose *Personnel Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Absence Counting* → *Rules for Absence Counting (New)*.

To check the employee subgroup grouping for time quotas, choose *Group Employee Subgroups for Time Quotas*. Check the relevant employee subgroups (**X0** and **X1**) to make sure that your employee is assigned to the employee subgroup grouping for time quotas **1**.

*Continued on next page*

To check the personnel subarea grouping for time quotas, choose *Group Personnel Subareas for Time Quotas*. Check whether your personnel subarea **TP##** is assigned to the grouping **01**.

To check the rounding rules that you want to assign to your counting rule, choose *Define Rules for Rounding Counted Absences*. Rule **01** corresponds to the requirements of this exercise: the values determined are rounded to the next whole amount.

### Define a counting rule with subrule 001

To create a new counting rule, choose *Define Counting Rules*.

Choose the *New entries* option, or choose *Edit* → *New entries*.

Enter the employee subgroup grouping **1** and personnel subarea grouping **01** as well as the counting rule **1##** (## = group number). Name your counting rule *Optional counting rule group ##*, for example.

Because the counting rule has two subrules, enter the sequence number **001** in this field. (You define the sequence number 002 in the next step.)

For the **Conditions for current day**, enter the following specifications:

The absence is to be counted on all days of the week. Select all seven days in the *Weekday* section of the screen.

The absence is counted according to its public holiday class. It applies on all holiday classes except **2**. In the *Holiday class* section, select the *Not a public holiday* option and the holiday classes **1** and **3** through **9**.

The absence is only to be counted if it is a workday according to the work schedule. Select the *Work acc. to work schedule* option in the *Day type* section of the screen.

Conditions for the work schedule:

Select all options in the *Counting class for period work schedule* and *Daily work schedule class* sections of the screen.

Conditions for the planned hours: Select the *Planned hours > 0* option. Conditions for absence/attendance: Choose both *< 1 day* and *Full-day* options.

Counting:

Because hours and days are to be counted in their entirety, enter **100%** as the quota multiplier for both areas.

Because only whole hours and days are to be determined, choose for each the rounding rule **01**. This enables the values determined to be rounded to whole amounts.

*Continued on next page*

The absence days and hours are to be first weighted by the quota multiplier, and then rounded. Leave the default option *Multiply first* as is.

No entries are required in the *Deduction rule* section.

Save your entries.

### **Define a counting rule with subrule 002**

In the Implementation Guide (IMG), choose *Personnel Time Management → Time Data Recording and Administration → Absences → Absence Catalog → Absence Counting → Rules for Absence Counting (New)*.

To create a new subrule of your counting rule, copy your subrule 001 and to subrule 002. Make the appropriate settings for subrule 002.

To do so, leave the current view by choosing *Back*, then select the subrule **001** from the initial screen, and then choose *Copy*.

For the new subrule, enter the sequential number **002** and modify the rule as follows:

Because the subrule **002** is only to be valid for days with public holiday class **2**, activate the public holiday class **2** option in the *Holiday class* block, and deselect all of the other options in this section.

Copy all of the other conditions in subrule **001** as they are to subrule **002**.

If you want to count in hours, copy the existing specifications. If you want to count in days, change the quota multiplier to **50%**. Change this value accordingly.

Now, days with holiday class 2, that is, half-day holidays, are counted using the second rule (002) at 50%; all other days are counted using the first rule (001) at 100%.

Save the subrule **002**.

### **3. Assign a counting rule to an absence type**

Assign the counting rule **1##** to the absence type **LE##**. Check if quota deduction for the absence type **LE##** is already activated.

*Continued on next page*

**Note:** Creating quotas and quota deduction are covered in the next unit.

a) **Assign a counting rule to an absence type**

To assign the counting rule **1##** (where **##** = your group number) to your absence type **LE##**, choose *Personnel Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Absence Counting* → *Assign Counting Rules to Absence Types* in the IMG.

Select the absence type **LE##** and choose *Details*, or choose *Goto* → *Details* from the menu.

In the *Counting rule* field for your absence type **LE##**, enter the counting rule **1##**.

Make sure that the *Quota deduction* field is activated.

Save your entries.



## Lesson Summary

You should now be able to:

- Set up rules for counting attendances and absences

## Lesson: Counting Using Daily Work Schedule Variants

### Lesson Overview

In this lesson, you learn about counting absences using daily work schedule variants.



### Lesson Objectives

After completing this lesson, you will be able to:

- Use daily work schedule variants to count absences

### Business Example

Counting rules are specified for these attendances and absences to determine how many payroll days or hours are to be calculated. These payroll days or hours are required for deduction from quota entitlements, for payment, or for other statistical purposes, for example. You must set up the appropriate counting rules and assign them to the individual attendance and absence types.

### Daily Work Schedule Variants



Example:	Mo	Tu	We	Th	Fr
Planned working hours according to work schedule	8	8	8	8	4
Basis for counting particular attendances/ absences	7.2	7.2	7.2	7.2	7.2



The planned working hours specified in the work schedule are not used when counting attendances/absences. Instead, a specific number of planned working hours (such as an average value) is referenced, which is specified in a daily work schedule variant.

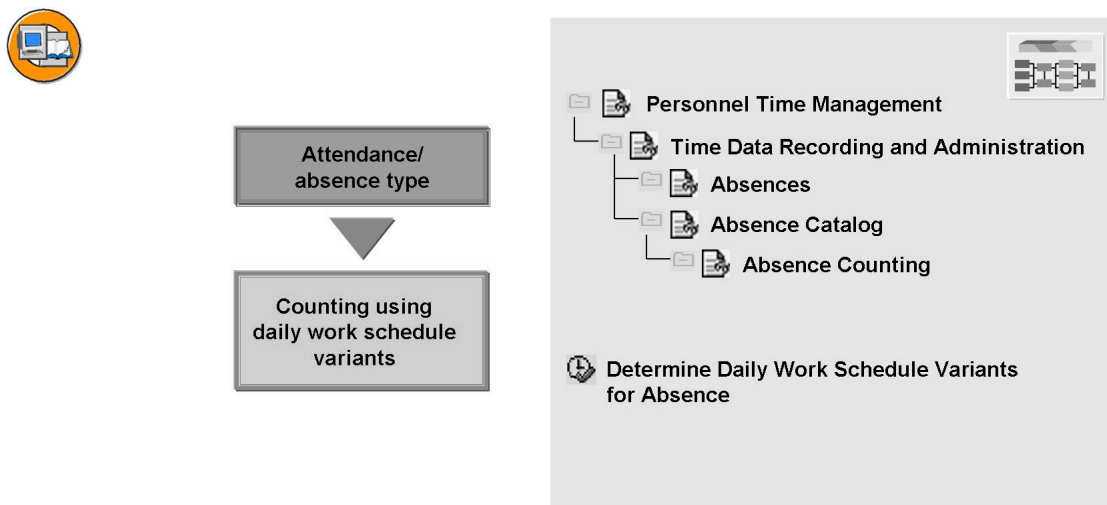
**Figure 102: Counting Using Daily Work Schedule Variants: Introduction**

The absence days and hours determined by the planned working hours stored in the work schedule are used as a basis for counting payroll days and hours.

Occasionally, you may not want the counting of certain full-day attendances or absences to be based on the planned working hours stored in the work schedule. You can influence the number of planned hours by assigning an applicable daily work schedule variant.

### Example:

In your enterprise, employees work eight hours each day from Monday through Thursday. On Friday, they work four hours. You want the absence hours for illness to be determined using averages. To do so, you specify a daily work schedule variant such as variant A with 7.2 hours, for example.



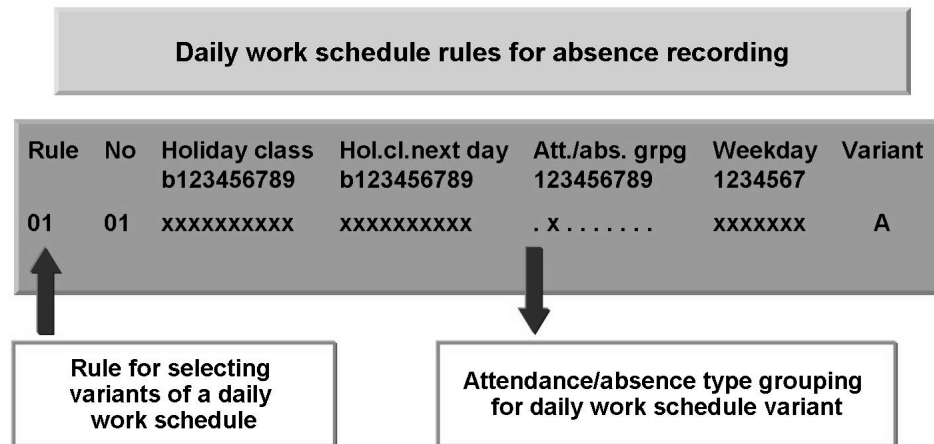
**Figure 103: Counting Using Daily Work Schedule Variants (1)**

Sometimes you may want an attendance or absence to be counted using a special daily work schedule variant (in addition to the counting rules). The variant must already exist and is referenced depending on the rules defined.

The process for doing so is similar to the one for setting up and controlling variants for the work schedule.

The relevant Customizing activities are under *Personnel Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Absence Counting* and, similarly, under *Attendances* → *Attendance Counting* in the IMG.





**Figure 104: Counting Using Daily Work Schedule Variants (2)**

Before you create the counting rule for daily work schedule variants, you must first check whether your attendance and absence type is correctly grouped. This grouping is only required for the attendance or absence types that you want to count using variants. Attendance and absence types to be handled in the same way must be grouped together in a grouping.

The value of the grouping is queried when variants are selected during attendance/absence counting

The rules are created taking the following conditions into account:

Public holiday class of the current day

Public holiday class of the following day

Grouping of absence or attendance types for daily work schedule variant

Weekday

The rule to be used for attendance/absence counting using daily work schedule variants must be assigned to the daily work schedule.



## Lesson Summary

You should now be able to:

- Use daily work schedule variants to count absences



## Unit Summary

You should now be able to:

- Set up rules for counting attendances and absences
- Use daily work schedule variants to count absences





## Test Your Knowledge

1. All attendances and absences are counted using the same rule.  
*Determine whether this statement is true or false.*
  - ☐ True
  - ☐ False
  
2. It is possible to use daily work schedule variants to base attendances and absences on different planned working hours.  
*Determine whether this statement is true or false.*
  - ☐ True
  - ☐ False



## Answers

1. All attendances and absences are counted using the same rule.

**Answer:** False

It is possible to assign the same rule to all attendances and absences, but each attendance and absence can also have a separate counting rule.

2. It is possible to use daily work schedule variants to base attendances and absences on different planned working hours.

**Answer:** True

It is possible to specify different planned working hours in the variant to be applied to a particular absence.

# Unit 8

## Attendance and Absence Quotas

### Unit Overview

This unit teaches you how to configure attendance and absence quota types. You also learn how to define default values for granting absence entitlements and how you can compensate quotas.



### Unit Objectives

After completing this unit, you will be able to:

- Set up attendance and absence quota types
- Set up deduction from quota entitlements
- Describe the methods for accrual of attendance and absence quotas
- Determine default values to accrue quota entitlements
- Use the quota overview
- Explain how quota entitlements are compensated

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## Lesson: Setting Up Attendance and Absence Quotas

### Lesson Overview

This lesson teaches you how to configure attendance and absence quota types.



### Lesson Objectives

After completing this lesson, you will be able to:

- Set up attendance and absence quota types

### Business Example

In your enterprise, employees are granted different attendance and absence entitlements for leave, educational leave, and so on. First, you need to create these different quota types. Furthermore, you want to use default values to accrue employees' absence entitlements, and have absence entitlements accrued automatically by a report. To do so, you must create the applicable rules in the system.

### Quotas

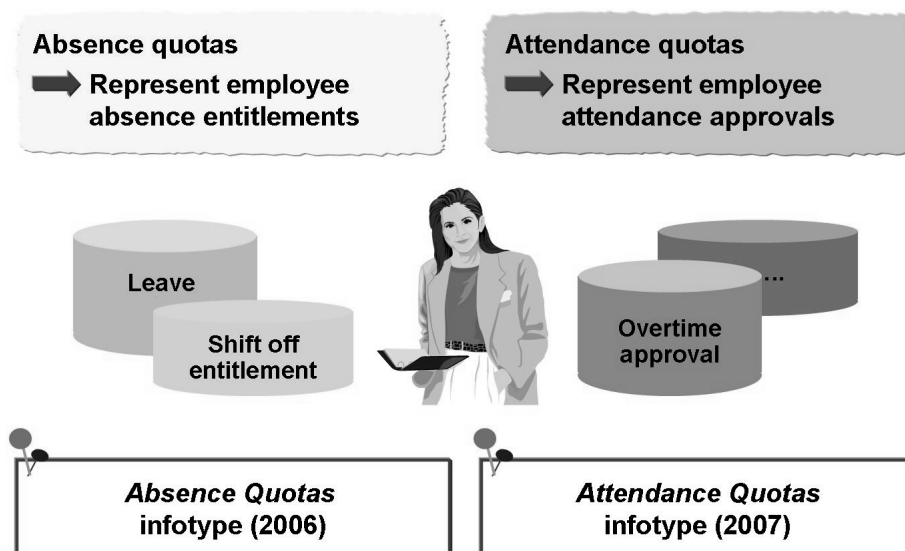


Figure 105: Introduction: Quotas

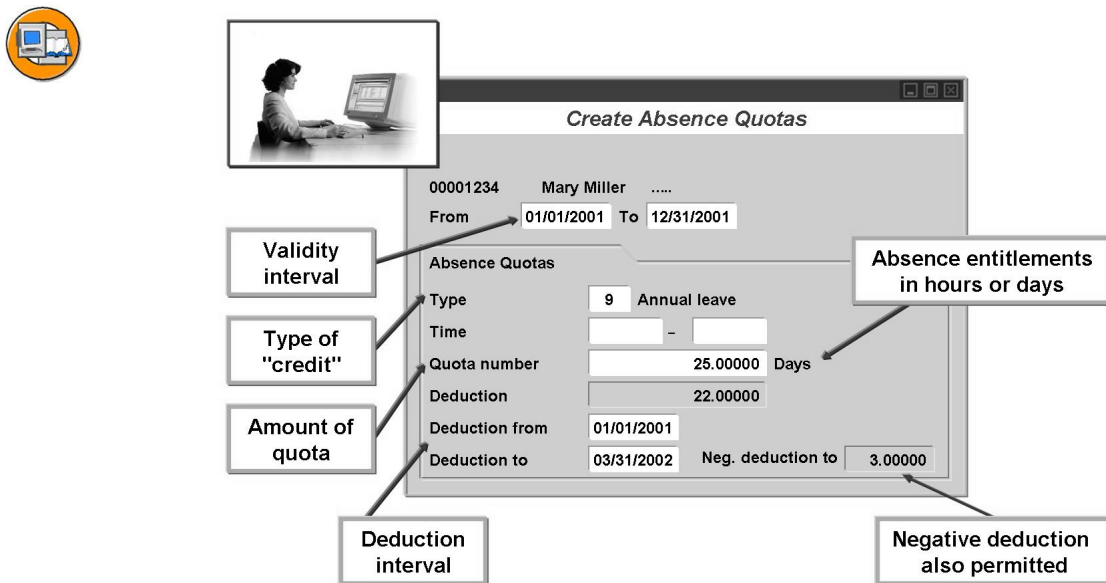
Employees in your enterprise are entitled to leave, additional training, and so on. These types of entitlements can be stored in quotas, from which attendances and absences are deducted.



You set up employees' absence entitlements, such as standard annual leave, non-working shift entitlement, and so on, in the *Absence Quotas* infotype (2006).

You set up approvals for special attendances (such as overtime approvals) in the *Attendance Quotas* infotype (2007). These approvals can be queried in time evaluation.

An absence quota is an employee's time-limited entitlement to an absence. Similarly, an attendance quota is an employee's time-limited entitlement to an attendance. Attendance quota types and absence quota types are used to represent these entitlements in the system.



The screenshot shows the 'Create Absence Quotas' SAP transaction. The employee ID is 00001234 and the name is Mary Miller. The validity period is from 01/01/2001 to 12/31/2001. The absence quota type is 9, Annual leave. The quota number is 25.00000 Days. The deduction is 22.00000. The deduction interval is from 01/01/2001 to 03/31/2002. The negative deduction to is 3.00000. Callouts point to the following fields:

- Validity interval: Points to the 'From' and 'To' date fields.
- Type of "credit": Points to the 'Type' field.
- Amount of quota: Points to the 'Quota number' field.
- Deduction interval: Points to the 'Deduction from' and 'Deduction to' date fields.
- Absence entitlements in hours or days: Points to the 'Days' unit field.
- Negative deduction also permitted: Points to the 'Neg. deduction to' field.

**Figure 106: Example: An Employee's Absence Quota**

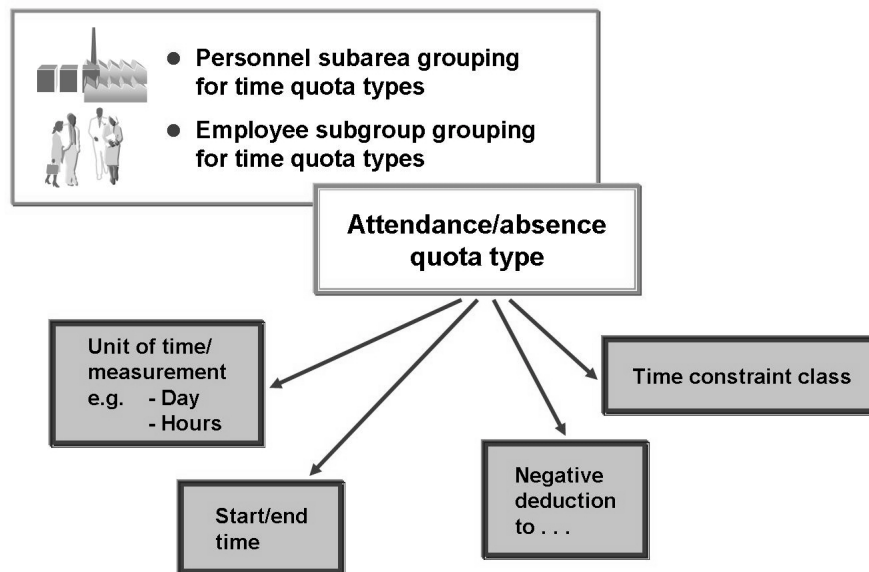
An attendance or absence quota (standard annual leave, for example) is granted to an employee for a specific validity period.

The deduction interval for the absence quotas specifies the period in which employees can use the quota. The deduction from and deduction to dates of the quota do not have to match the validity period.

The type of credit (standard annual leave, educational leave, and so on) is determined by the quota type.

The amount of credit is specified by the quota number (in days or hours).

When you customize each quota type, you define whether the quota is managed in days or hours and whether deduction beyond zero is permitted.



**Figure 107: Attendance and Absence Quota Types**

Attendance and absence quota types are defined in the IMG based on the personnel subarea and employee subgroup groupings for time quota types.

An employee subgroup grouping for time quota types is a break-down of employee subgroups for which the same attendance and absence quota types are valid.

A personnel subarea grouping for time quota types is a break-down of personnel subareas for which the same attendance and absence quota types are valid.

For each quota type, you specify the time unit (days/hours) you want to use to manage the quota. If you want to restrict the validity of entitlements to certain clock times, you can specify an applicable time interval for each quota type. If this time interval is adopted when you create a quota for an employee, the entitlement applies only within the specified time interval.

Furthermore, you can specify the amount to which a quota can be deducted beyond its entitlement. The amount specified for negative deduction also appears in the *Attendance Quotas (2007)* and *Absence Quotas (2006)* infotypes.

Each attendance or absence quota type is assigned a time constraint class, which is checked if time infotypes collide.

Absence quota types can be locked for compensation.



## Lesson Summary

You should now be able to:

- Set up attendance and absence quota types

## Lesson: Quota Deduction

### Lesson Overview

In this lesson, you learn how to set up quota deduction.



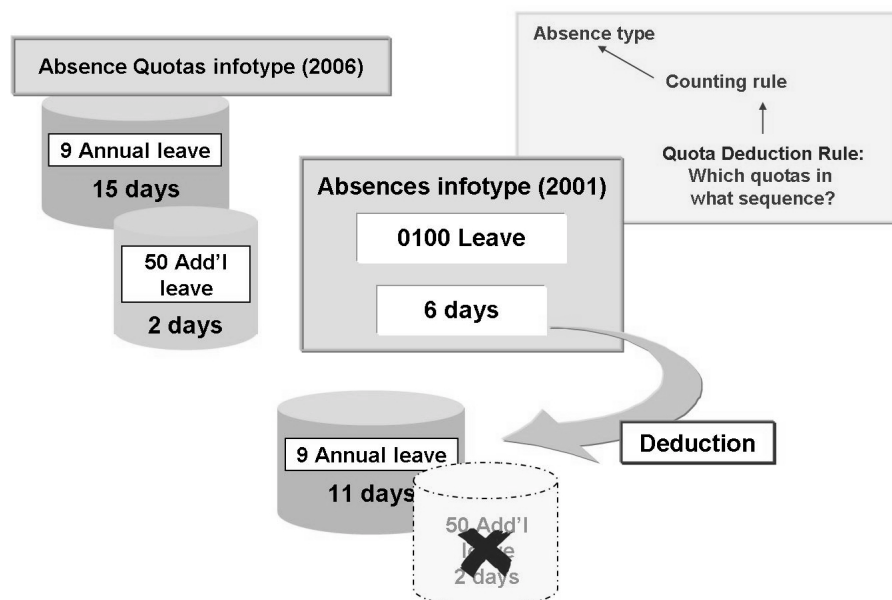
### Lesson Objectives

After completing this lesson, you will be able to:

- Set up deduction from quota entitlements

### Business Example

[Use a business example to explain the practical use of this lesson for an enterprise.]



**Figure 108: Quota Deduction: Overview**

Absences are entered in the *Absences* infotype (2001), and the absence type is specified. Attendances are entered in the same way in the *Attendances* infotype (2002), where the attendance type is specified.

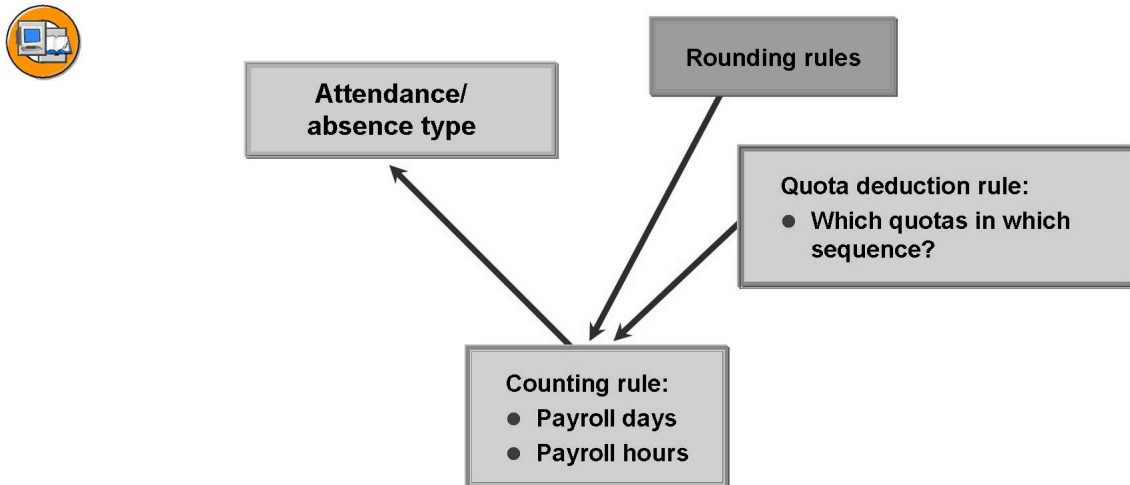
Absence quotas are specified with their corresponding quota types in the *Absence Quotas* infotype (2006), and attendance quotas in the *Attendance Quotas* infotype (2007).

Quotas and the attendances and absences to be deducted from them are stored for a specific key date. Number range intervals must be defined in the IMG for this purpose.

If quotas are to be deducted by attendances and absences, you have to specify which absence or attendance type is deducted from which quotas in which sequence.

### Example:

An employee's annual entitlement to leave is stored in the *Absence Quotas* infotype (2006) in combination with the relevant quota type. For example, an employee has 25 days of standard annual leave (represented in quota type **9**), as well as 3 days of additional leave (represented in quota type **50**). If the employee takes leave (absence type **0100**), then you must specify from which quota this absence type 0100 is to be deducted and in what sequence the applicable quotas are to be deducted. This relationship is detailed in the following slides.



**Figure 109: Interaction Between Deduction and Counting**

An attendance/absence type can be deducted from a quota only if a relationship already exists between the attendance/absence type and the applicable quota.

This relationship is established by an assignment made in the IMG under *Managing Time Accounts Using Attendance/Absence Quotas → Quota Deduction Using Attendances/Absences*.

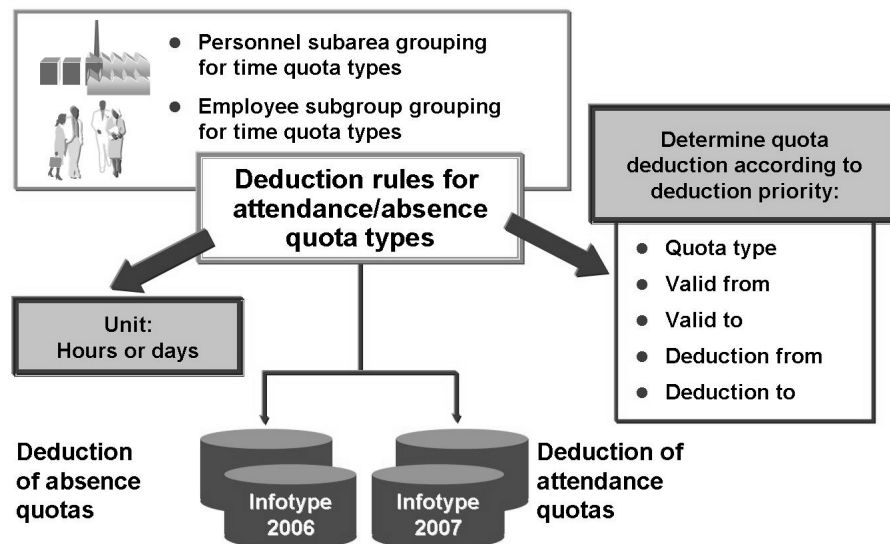
A counting rule is assigned to the attendance/absence type to determine the payroll hours and days for the duration of this attendance/absence. In turn, quota deduction rules are assigned to the counting rules to determine the quotas from which the attendance/absence type is to be deducted, and the sequence of quotas.

The *Activate Quota Deduction* option specifies whether or not quota deduction is to take place for each attendance/absence type.

If you activate the option when assigning a counting rule to an attendance/absence type, then the attendance/absence type is deducted from the quotas according to the quota deduction rule stored in the counting rule.

If the quota deduction option is not activated for a particular attendance/absence type, then the quota deduction rule assigned to the counting rule does not apply to this attendance/absence type.

A rounding rule can also be assigned to a counting rule to round the payroll hours and days determined.



**Figure 110: Deduction Rules for Attendance and Absence Quotas**

The sequence for deducting quotas of different quota types is specified in the deduction rules. This sequence can be determined depending upon various criteria (such as the quota type), which can be assigned priorities. In this way, you can define a specific sequence of quota types.

These deduction rules are based on the employee subgroup grouping for time quotas and the personnel subarea grouping for time quotas.



Unit of relevant absence quota types

☐ Hours ☒ Days

Absence quota types		
Absence quota type	Quota text	Unit
11	Leave for challenged EEs	Days
9	Annual leave	Days

Quota type sequence for further deduction

☒ No further deduction  
☐ Sort all other quota types in ascending order  
☐ Sort all other quota types in descending order

Deduction priority

Absence quota types	Priority 1		
Valid from date	Not relevant	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending
Valid to date	Not relevant	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending
Deduction from	Priority 3	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending
Deduction to	Priority 2	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending

**Figure 111: Example: Deduction Rule for Absence Quotas**

A deduction rule for absence quotas depends on the personnel subarea grouping for time quotas and the employee subgroup grouping for time quotas. The deduction rule is indicated by a 3-digit number.

The unit (hours or days) of the quota types to be deducted is selected in the deduction rule. This unit must be the same unit as in the quota types to be deducted.

Using the deduction priority, you can set priorities for deduction based on criteria such as **quota type**, **validity start/end**, and **deduction start/end**.

Furthermore, you can store a specific sequence for quota deduction (up to 100 quota types in a certain sequence). If you want quotas to be deducted that are not listed explicitly, you can specify the sequence for subsequent deduction. The deduction sequence can be descending or ascending according to the quota type. First the special sequence is used, then the sequence for subsequent deduction.

So that this special sequence or the quota type sequence for next deduction is taken into account, you have to set a priority for the quota type.

If the deduction sequence no longer corresponds to the rule as a result of subsequent cancellations, you can use the **RPTBPC10 report** to restore it.



ES grouping: 1  
 PS grouping: 01  
 Counting rule: 010 L  
 Sequential no.: 001

Applicability of rule: .....

Counting: .....

Deduction rule:

Absence quotas		Attendance quotas	
Within entitlement	010	Within entitlement	
Over entitlement		Over entitlement	

Attendance/absence type

Rounding rules

Quota deduction rule:  
 • Which quotas in which sequence?

Counting rule:  
 • Payroll days  
 • Payroll hours

**Figure 112: Assigning Quota Deduction Rules to Counting Rules**

Quota deduction rules are assigned to counting rules. Rules governing the deduction of absence quotas and rules governing the deduction of attendance quotas are assigned to a counting rule.

The deduction rules for attendance quotas and those for absence quotas are each specified in separate areas.

You have two options in each area for specifying deduction rules: You can specify deduction rules that:

Govern the deduction of quotas up to the existing entitlement in the *Absence Quotas* (2006) and *Attendance Quotas* (2007) infotype.

Regulate deduction from quotas over and above the existing quota entitlement

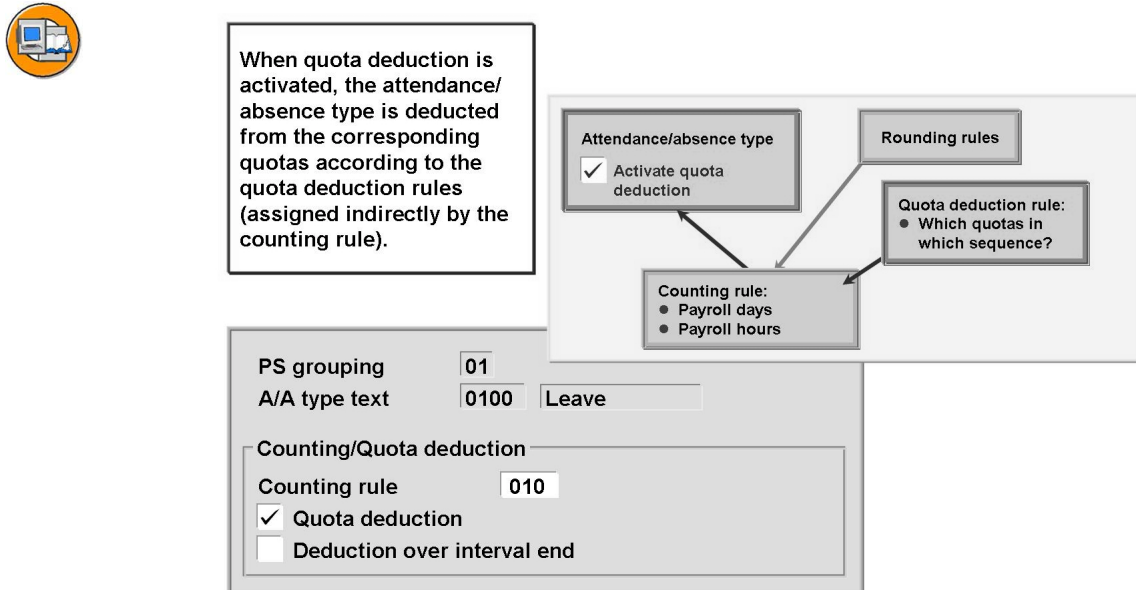
**Note:** As a prerequisite, there must be corresponding quotas with a negative lower deduction limit in the infotype for the relevant period (*Negative deduction to* field in the *Absence Quotas* (2006) and *Attendance Quotas* (2007) infotypes).

**Note:**

The deduction rules in the *Within entitlement* and *Over entitlement* fields within the same block must deduct from attendance/absence quotas using the same time unit.

In contrast, deduction rules for absence quotas and those for attendance quotas can use different time units.





**Figure 113: Activating Quota Deduction**

To assign a counting rule to an attendance/absence for determining payroll hours and days, choose the *Assign Counting Rules to Absence Types* (or *Assign Counting Rules to Attendance Types*) activity. You assign a counting rule to the attendance/absence type in the *Counting/Quota Deduction* section.

To activate quota deduction, set the *Quota deduction* indicator. Then the system accesses the applicable deduction rules in the counting rule (quota deduction rules for absence quotas in the case of absence types, and the quota deduction rules for attendance quotas for attendance types). The corresponding attendance/absence type is deducted from the quotas in the *Absence Quotas* (2006) and *Attendance Quotas* (2007) infotypes according to the specifications for quota deduction rules.

If you want quota deduction to be continued after the end date of the quota interval, activate the *Deduction over interval end* field. The deduction is carried out as long as the start date for the applicable attendance/absence record lies within the deduction interval of the quota.

**Example:** For the **Leave** absence type, the counting rule **010** is specified for determining payroll days and hours. Rounding and deduction rules are assigned to this counting rule. Because quota deduction is activated for the absence type **Leave**, the recorded time is deducted from the absence quota according to the deduction rules for absence quotas stored in the counting rule.



## Lesson Summary

You should now be able to:

- Set up deduction from quota entitlements

## Lesson: Determining Default Values to Grant Absence Entitlements

### Lesson Overview

This lesson provides an overview of the methods for accruing quotas. You also learn how to set up default values for accruing absence entitlements.



### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the methods for accrual of attendance and absence quotas
- Determine default values to accrue quota entitlements

### Business Example

In your enterprise, employees are granted different attendance and absence entitlements for leave, educational leave, and so on. First, you need to create these different quota types. Furthermore, you want to use default values to accrue employees' absence entitlements, and have absence entitlements accrued automatically by a report. To do so, you must create the applicable rules in the system.

### Methods

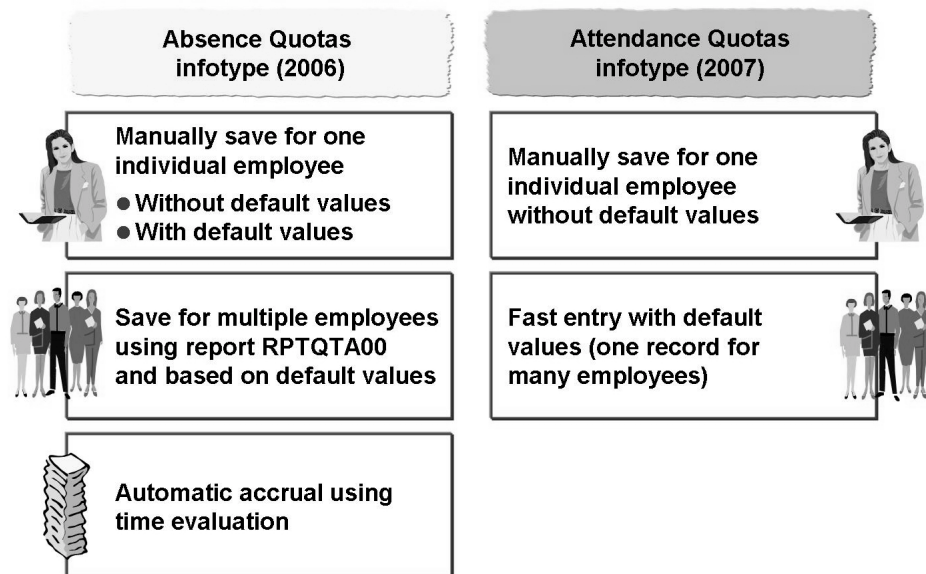


Figure 114: Quota Accrual: Overview

There are various methods available for granting absence entitlements to employees:

By manually recording absence entitlements in the *Absence Quotas* infotype (2006), where absence entitlement is granted to employees individually based on special criteria

By setting default values for entitlements when creating records in the *Absence Quotas* infotype (2006)

By automatically accruing absence entitlements. The entitlement determined has to be changed only in exceptional cases.

An addition, two methods are available to automatically accrue time-off credits:

Using the **RPTQTA00 report**, you can generate time-off entitlements for groups of employees that granted for all the relevant employees in advance. One such example is annual leave, which is granted in advance for one calendar year.

If time evaluation (RPTIME00) is in use, you can also permit time-off entitlements to be determined proportionately after a calculation period is completed. Standard leave is an example where entitlement increases for each employee at the end of a calculation period. In this process, as opposed to the general granting of leave in advance, employees receive their time-off entitlement after they have "worked for it."

Attendance quotas are specified manually in the *Attendance Quotas* infotype (2007).

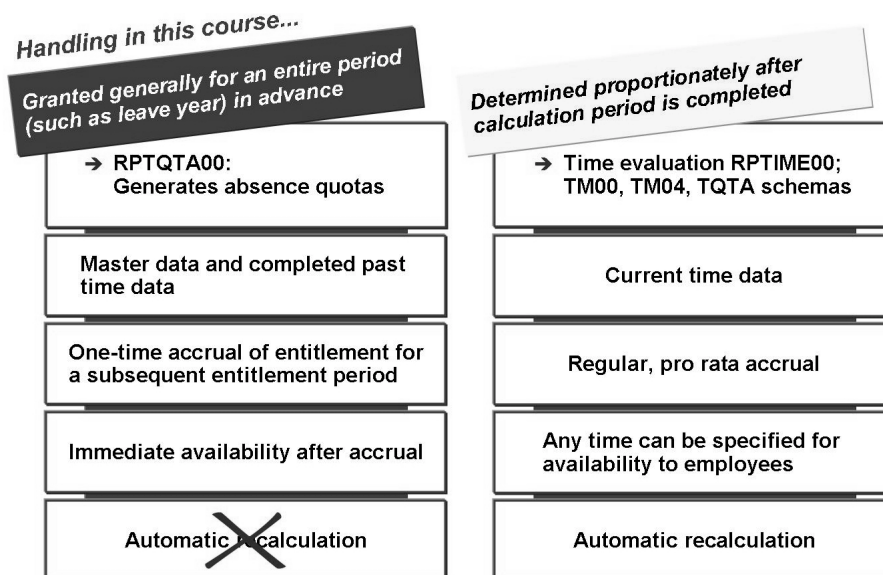


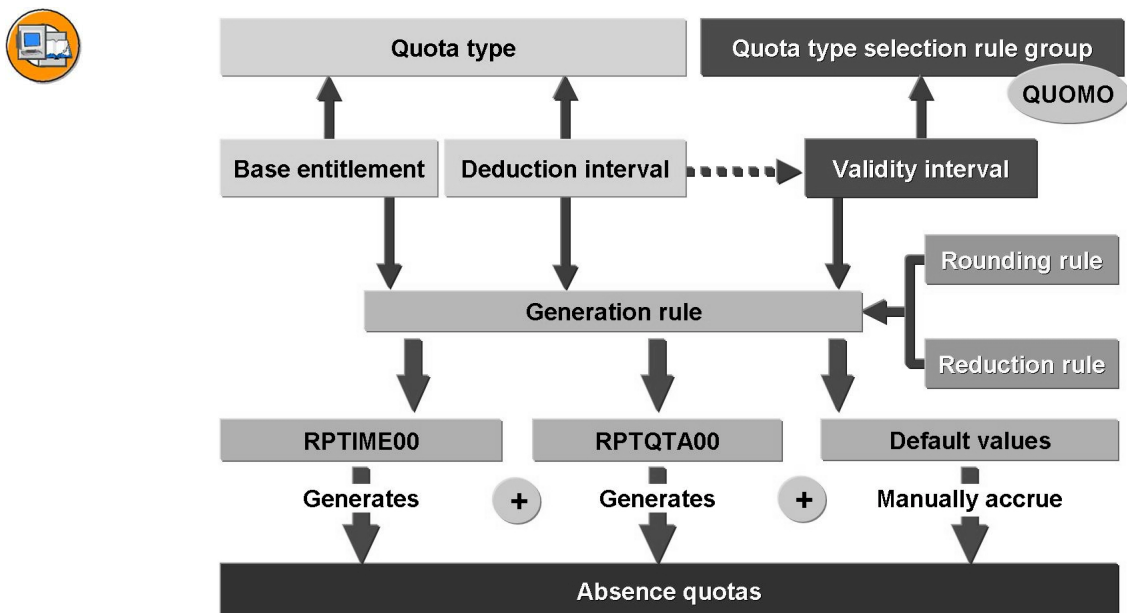
Figure 115: Absence Entitlements in the Absences Infotype (2006)

The method used for accruing absence entitlements depends upon whether absence entitlement is granted in a lump sum in advance or proportionately after a calculation period has been completed.

Where absence entitlement is granted in its entirety in advance, the total entitlement for a subsequent period (such as a calendar year) is accrued at one time in advance. The entitlement is immediately available in the *Absence Quotas* infotype (2006). The system can calculate the entitlement on the basis of the employee's HR master data, such as age or seniority. If you use time evaluation, you can take account of completed time data from past periods.

If an absence entitlement is granted in its entirety, you can manually overwrite the generated data records in the *Absence Quotas* infotype (2006).

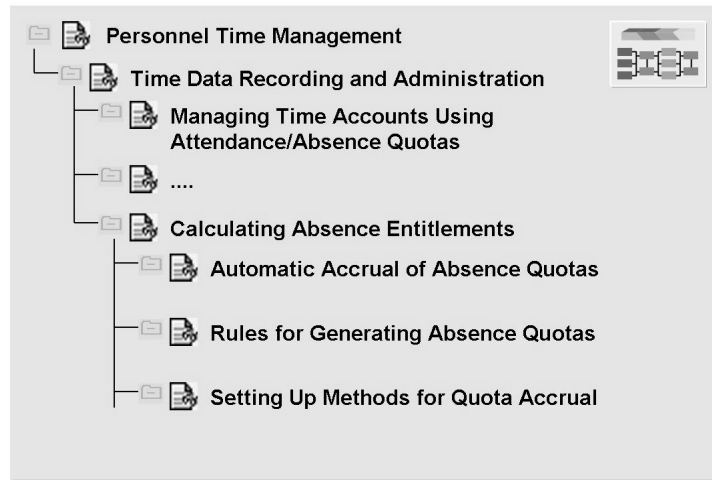
If you use time evaluation, you can determine time-off entitlements proportionately after a calculation period is completed. Unlike advance, lump sum entitlements, in this method, employees are granted their entitlements only after they have already "worked" for them. Current time data can also be used as the basis for determining entitlement. An employee, for example, might be entitled to 1.5 days of time-off entitlement for each payroll period - provided he or she has completed the planned hours. The period for which the credit is calculated and the time at which the quota is stored in a record in the *Absence Quotas* infotype (2006) are independent of one another.



**Figure 116: Accrual of Absence Entitlements**

Absence quotas can be filled using generation rules or default values.

In this slide, you get an overview of the various elements that play a part in the accrual of absence entitlement, and the different methods used for accrual.

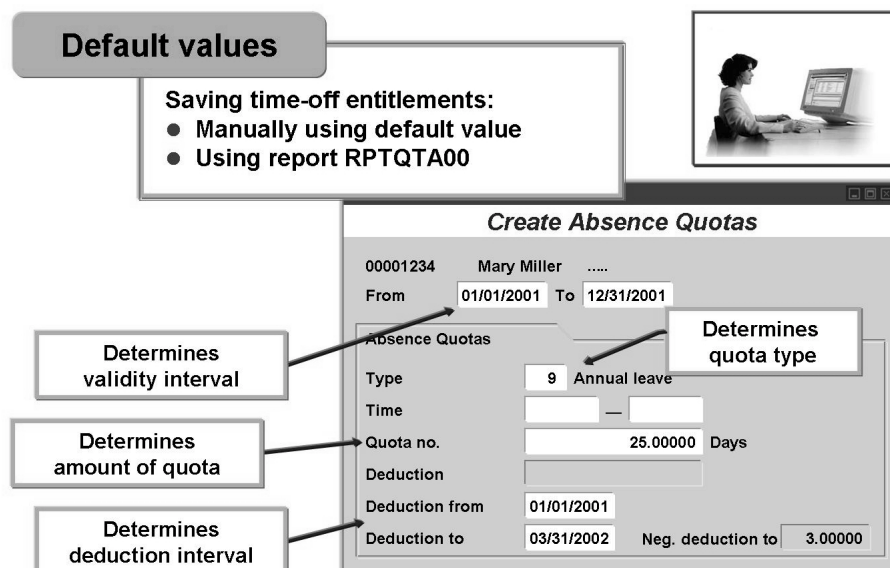


**Figure 117: Calculating Absence Quota Entitlements**

Note:

Generation rules for granting lump-sum entitlement to time-off credits and those for automatic quota accrual using time evaluation are mainly set up in the same Customizing activities in the Implementation Guide (IMG).

The following section focuses on how to create rules for calculating absence entitlements based only on determining default values and the generating of entitlements using the RPTQTA00 report (Generate Absence Quotas).

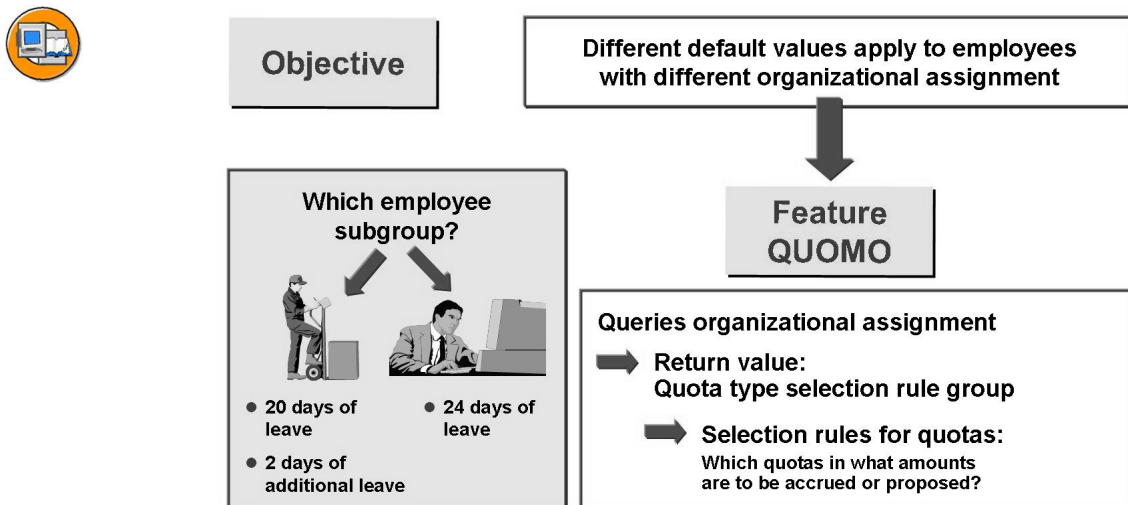


**Figure 118: Granting General Absence Entitlements: Default Values**

You must specify for all quota types whether they are to be accrued automatically using time evaluation, or manually, or using the report RPTQTA00 (Generate Absence Quotas).

You must specify in the IMG before calculating absence entitlements that quota types accrued either manually or using the RPTQTA00 report are not to be generated in time evaluation.

When granting general absence entitlements in advance using default values or the report RPTQTA00, the system determines the quota type, quota number, and validity and deduction periods from Customizing tables.



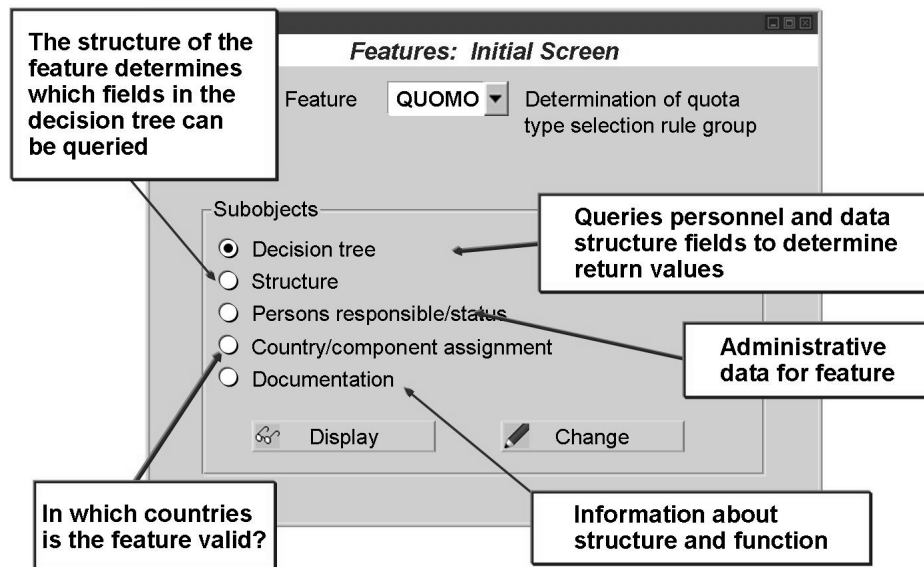
**Figure 119: Determining Quota Type Selection Rule Group**

You can use the quota type selection rule group to control absence quota type selection based on the employee's organizational assignment. By using different quota type selection rule groups, you can define different rules for quota selection.

In manual accrual of quotas using default values and for quota accrual by report RPTQTA00, the quota type selection rule group is determined using the **QUOMO** feature. You use the QUOMO feature to define which quota type selection rule group your employees are assigned to, based on their organizational assignment. In a subsequent step, you specify selection rules for the quota type selection rule group to control absence quota accrual.

**Example:** Salaried employees are granted 24 days of standard annual leave for each year. In contrast, hourly-wage earners are granted 20 days of standard annual leave, with 2 days of additional leave. You make this distinction by assigning a different quota type selection rule group to the different employee subgroups (salaried employees, hourly-wage earners). These quota type selection rule groups are each assigned quota selection rules that determine what amounts of which quotas are to be proposed or accrued.

**Note:** If you use time evaluation, you can also assign the quota type selection rule group in the time evaluation schema.



**Figure 120: Maintaining Features (1)**

Features are objects within the SAP R/3 System that determine a particular value, called a return value or result, by querying various personnel or data structure fields. The value is used to determine default values or to control certain system processes. In this way, features improve system flexibility.

There are two options for accessing feature maintenance:

By branching directly to feature maintenance from the IMG for Personnel Time Management or Payroll. In this case, the feature called is always the one that is assigned to that step in the IMG.

By accessing the feature maintenance transaction, **PE03**, directly. The *Features: Initial Screen* appears.

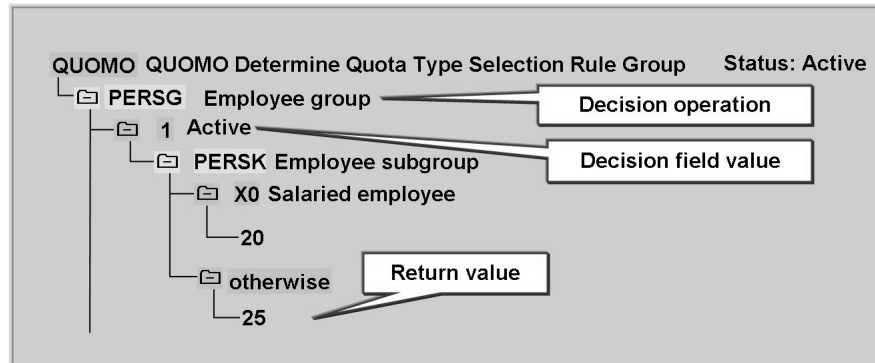
Features are defined by the following five elements, which must be maintained in the following sequence when creating a feature:

- Person responsible for a feature
- Documentation for feature
- Country/component assignment of a feature
- Structure of feature
- Decision tree for feature





### Decision tree (tree maintenance)



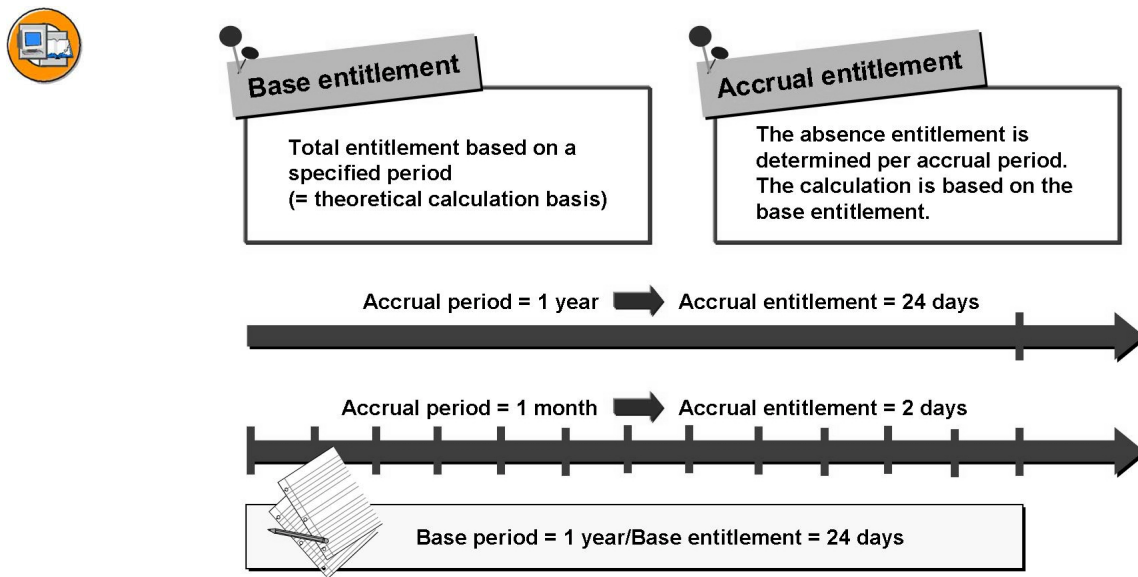
**Figure 121: Maintaining Features (2)**

In the decision tree of the QUOMO feature, you define which quota type selection rule group is valid for which employees. The decision rule in the feature can be structured according to various organizational elements, such as company code, personnel area, employee group, employee subgroup.

Decision trees can be simple or very complex, depending on their function and the number of fields, operations, and decision criteria included.

The employee group is queried first in the above example. For the employee group **1** (active employees), the employee subgroup is queried. For employee group **1** and employee subgroup **DU** (salaried employees), the quota type selection group **20** is set; for all other employee subgroups, the quota type selection group **25** is set. This enables you to differentiate between employees with a different organizational assignment.

If you prefer the table maintenance layout, you can switch to it by choosing the *View* menu option.



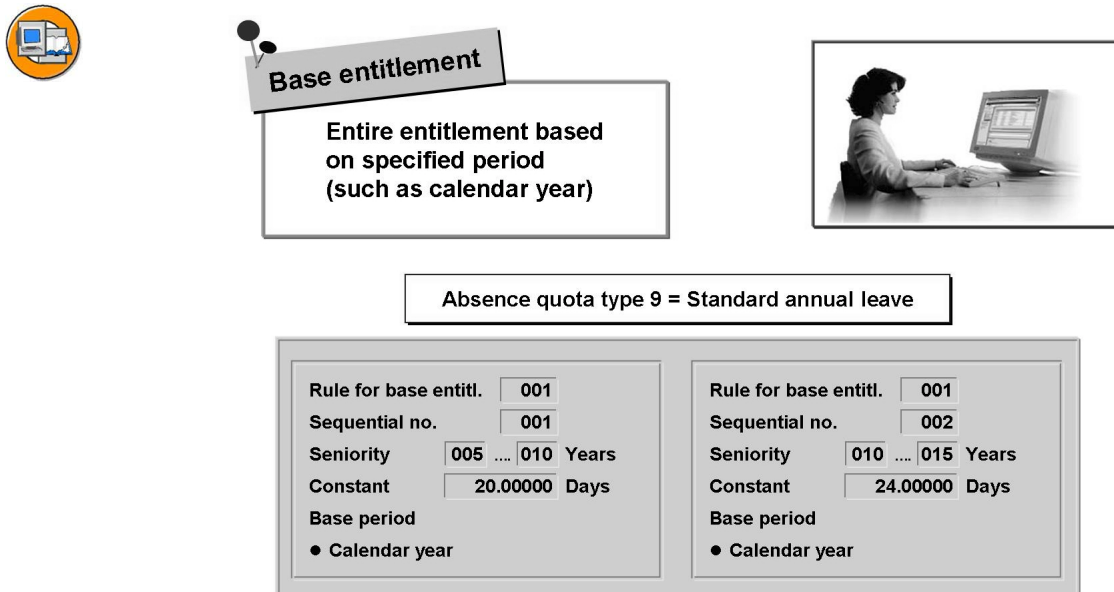
**Figure 122: Explanation of Terms: Base Entitlement and Accrual Entitlement**

**Base entitlement/period:** For each absence quota type, you can store a total entitlement (in days or hours) based on a specified period (such as a calendar year). The base entitlement is a theoretical value used as the basis for calculating the accrual entitlement.

**Accrual period:** This period describes the interval that applies to calculating the absence credit. The accrual period can be selected independently of the base period (such as payroll period, month, and so on). The accrual and base periods can also be identical.

**Accrual entitlement:** The accrual entitlement is the absence entitlement calculated for an accrual period. The calculation of the accrual entitlement is based on the base entitlement. By comparing the base period and the accrual period, the system converts the base entitlement to the accrual period, and, in this way, determines the accrual entitlement. For example, the accrual entitlement (for a base entitlement of 24 days per year), based on an accrual period of 1 month, is 2 days.

You can set the accrual period based on collective agreements, legal provisions, and internal company policy.



**Figure 123: Define base entitlements**

The base entitlement represents the calculation base used to calculate the proportionate absence entitlement for each accrual period.

The base entitlement can be determined on the basis of an employee's age or seniority.

If you want to define different base entitlements for each age or seniority interval, then you can summarize this in one rule. The individual intervals of the rule are differentiated by the assigned sequential number. They are delimited from one another by open-ended intervals.

The base entitlement is related to a fixed period. It can be

Based on a calendar year or any period of your choice

Determined using time evaluation or payroll periods

Determined on the basis of the accrual period



Determines deduction interval for each quota type

View "Validity/Deduction Interval for Absence Quotas": Detail

Absence quota type **9** Standard annual leave

Deduction interval

Deduction from

☒ Start of validity interval

☐ End of validity interval

Rel. position

No deduction before **01** Expiry of probation

Deduction to

☐ Start of validity interval

☒ End of validity interval

Rel. position **3** months

No deduction after

View: "Validity Period: Absence Quotas for Default Values": Details

Quota type sel. grp **30**

Valid from

☒ Calendar year

☐ Time evaluation period

☐ .....

Rel. position

Valid to

☒ Calendar year

☐ Time evaluation period

☐ .....

Rel. position

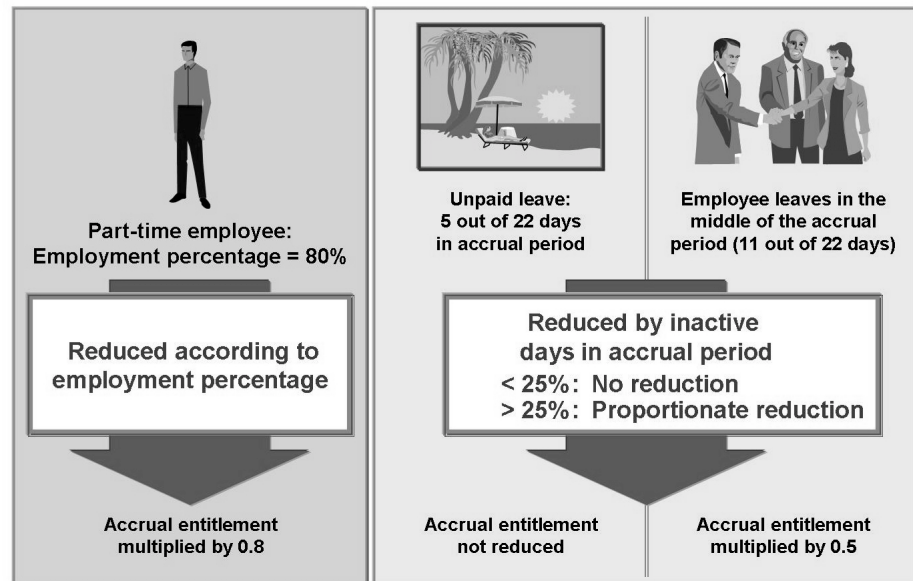
Determines default values for validity period for each quota type selection rule group

Figure 124: Validity and Deduction Intervals

To determine absence entitlements using default values or to accrue absence entitlements using the **RPTQTA00** report, you can determine the validity and deduction periods for the quota types as follows:

Default values for the validity period are specified for each quota type selection rule group. This means that the same validity period is proposed for all quotas that are proposed for each quota type selection rule group. These default values for the validity period are set up in the IMG in the *Set Up Automatic Accrual Using Report RPTQTA00* activity for each quota type selection rule group.

The default value for the deduction interval is determined for each quota type. The start and end times for deduction are defined relative to the validity start and end. These default values for the deduction period are set up in the IMG in the *Determine Validity and Deduction Periods* activity. (The name of the IMG activity reflects the fact that the validity interval is also specified for the quotas accrued in time evaluation.)



**Figure 125: Reduction Rules**

In the *Define Rules for Reducing Quota Entitlements* activity, you define the reduction rules to determine the conditions under which a calculated entitlement is to be reduced.

Reduction rules are used if employees are not to be granted full entitlement to an absence quota because they:

Worked part-time

Were not employed for the entire period, that is, they had inactive periods of employment because they just started working at the company, or they left a company, for example

Had certain absence times that had an "inactive" day status, such as unexcused absences. You indicate whether an absence is valued as inactive time by using an appropriate absence type.

Reduced working times can be identified using special absence quotas. You determine in absence quota type selection whether the reduced times are to be omitted or collected in other special absence quotas.

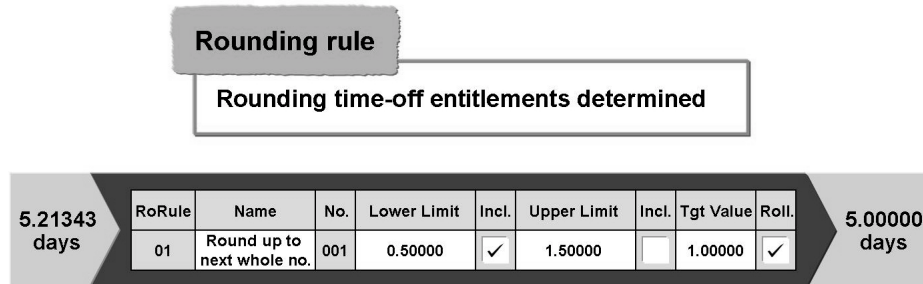


Figure 126: Rounding Rules

In the *Define Rules for Rounding Quota Entitlements* step, you define rounding rules to round the quota entitlements determined by the system.

You can define several rounding rules. A rounding rule is uniquely indicated by its 2-digit number and can consist of several complementary subrules. The system runs through the subrules until one is met.

You define an upper and lower limit for the rounding interval in a rounding rule. In the two *Incl.* columns, you activate the switch to specify whether the upper and lower limits are to be included when calculating the interval. You enter the value to which you want to round up or down in the *Target value* column. In the *Roll.* column, you indicate if the interval is to be rolled, that is, copied to all subsequent intervals, by activating the switch. In this case, the duration of the interval is always taken into account.

These rounding rules are also used when determining attendance/absence hours and days in attendance and absence counting.

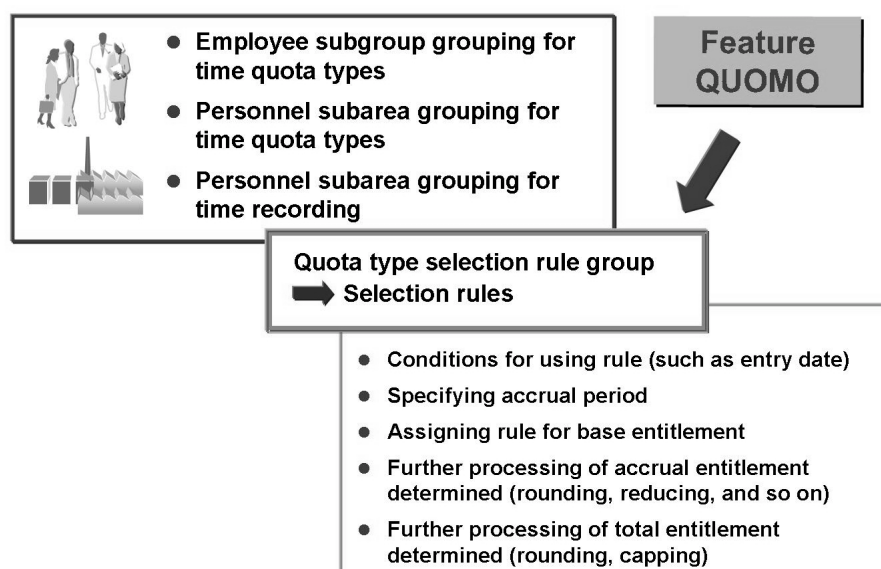


Figure 127: Selection Rules

In the *Define Generation Rules for Quota Type Selection* step, you define rules for the accrual of employees' time-off entitlements. This section focuses only on the rules applying to determining default values or generation using the RPTQTA00 report.

The rules for quota selection are defined according to the above-named personnel subarea and employee subgroup groupings.

**Note:** The personnel subarea grouping for time recording is located in the *Time Evaluation* section of the IMG.

In addition, these rules are defined based on a quota type selection rule group. The quota type selection rule group is set in the QUOMO feature on the basis of the employee's organizational assignment. Selection rules are stored for the quota type selection rule group to determine the quotas to be accrued, the amounts, how they are rounded, and so on.

Quotas are accrued for the applicable employees using the RPTQTA00 report or default values for creating quotas are determined according to the selection rules.



■ <b>Applicability of rule</b>	<p>Under what conditions (such as employee's entry date, degree of challenge) is the rule to be used?</p> <p>What is the earliest date for accruing an employee's entitlements?</p>
■ <b>Accrual period</b>	<p>Entitlements are to be determined for what accrual period?</p>
■ <b>Determining base entitlement</b>	<p>Which rule is to be used for the base entitlement?</p> <p>What key date is to be used for determining seniority and/or age?</p>

**Figure 128: Absence Quota Type Selection (1)**

In a selection rule for quota types, you make the following settings:

In the *Applicability* tab, you define the conditions under which the selection rule is to be used (dependent on employee's hiring date or only for employees in a certain challenge group or with a certain degree of challenge, for example). In addition, you can also specify the earliest date on which the absence entitlement can be acquired (such as after a probation period).

In the *Accrual period* tab, you define the accrual period for determining the entitlements.

In the *Base entitlement* tab, you specify a previously created rule for base entitlement to set the applicable base entitlement (depending on age and seniority, if required). This base entitlement is used to determine the accrual entitlement. You can also specify how age or seniority is to be determined.



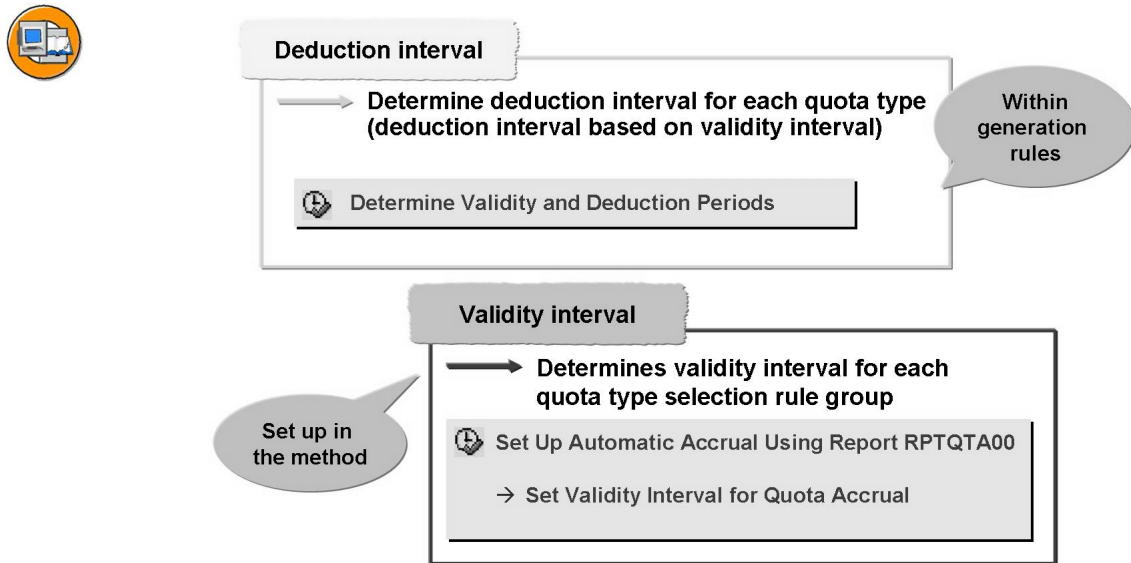
<p>■ <b>Further processing of accrual entitlement</b></p>	<p>Is accrual entitlement to be reduced or rounded?</p> <p>Should there be a maximum entitlement for each accrual period which must not be exceeded?</p> <p>Should differences that arise from a reduction or from a maximum value being exceeded be posted to a special quota?</p>
<p>■ <b>Total entitlement</b></p>	<p>Should the total entitlement determined be rounded?</p> <p>Is there a specific maximum value that must not be exceeded?</p>

**Figure 129: Absence Quota Type Selection (2)**

A preliminary accrual entitlement can be determined on the basis of the data in the first three tab pages. You can specify in the *Further processing of accrual entitlement* tab whether and when it is to be reduced - for part-time employees, for example - and whether it is to be rounded. To do so, you assign an appropriate reduction or rounding rule. You can also set a maximum value that is not to be exceeded.

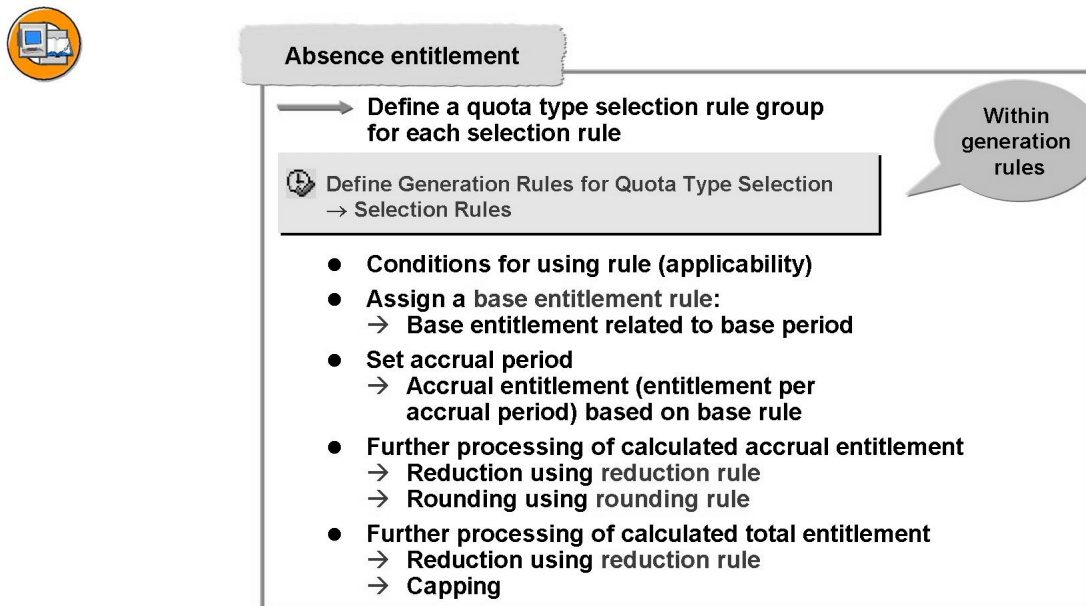
In the *Total entitlement* tab, you can also enter specifications regarding the total entitlement determined (rounding, maximum value).





**Figure 130: Deduction and Validity Intervals: Overview**

The following slides show an overview of the Customizing steps in which you determine which quotas are accrued using the RPTQTA00 report or proposed in the *Absence Quotas* infotype (2006); the amounts, and validity and deduction intervals.



**Figure 131: Generation Rules: Overview**

If you want to accrue several quotas with different quota types for employees with a certain organizational assignment, you can specify several selection rules for the corresponding quota type selection rule group. In each of these selection rules,

you specify how quotas of a particular quota type are to be accrued depending on the specified conditions, taking the applicable rounding, capping, and reduction rules into account.



- **A new feature in SAP R/3 Enterprise is the option of using the RPTQUOTA\_CHECK report to check your Customizing settings for quotas:**
- **Selection by:**
  - **Persons**
  - **Time management groupings**
- **Output of:**
  - **All applicable selection rules with**
  - **All Customizing settings for that selection rule**

**RPTQUOTA\_CHECK**

Program System title

Overview of Customizing Settings for Quota Generation

Key Date: 09.08.2005

Personal Data:

Personnel No.: 30692200 Karm Anderson  
 Personnel Area: C480 Personnel Subarea: TP90 EE Subgroup: X0 Employee Group: 1  
 Entry Date: 01.01.2004 Employment Percent: 50.00 %

Selected Selection Rules		Quota type sel. grp	ESG Time quota types	PS gpg tm quot
<input type="checkbox"/> Selection Rule (T559L)	Absence quota type	09	1	01
<input type="checkbox"/> Quota Types (T556A)	Absence quota type	Generation Behavior	Start Date	End Date
<input type="checkbox"/> Generation Quota	(09 Leave (Days))	No Generation	01.01.1900	31.12.9999
<input type="checkbox"/> Base Entitlement (T559E)	Absence quota type	Sequential no.	Start Date	End Date
<input type="checkbox"/> (000)	(09 Leave (Days))	001	01.01.1900	31.12.9999
<input type="checkbox"/> (001)	(09 Leave (Days))	002	01.01.1900	31.12.9999
<input type="checkbox"/> Validity/Deduction Intervals	Valid from date	Valid to date	Deduction from	Deduction to
<input type="checkbox"/> (09 Leave (Days))	From Calendar Year (T559V)	To Calendar Year (T559V)	Start of Validity Interval	End of Validity Int
<input type="checkbox"/> Reduction Rules (T559M)	Basic Data for Part Time Employees	Key Date for Part Time Employees	Reference Period for Inactive Days	Pct. inactive calc
<input type="checkbox"/> (01 Reduce by inactive days)	No Reduction	Day by Day in Accrual Period	Accrual Period	100.00 Pct.
<input type="checkbox"/> Rounding Rules (T559R)	Rounding Rule	Sequential no.	Lower Interval Limit	Upper Interval Lim
<input type="checkbox"/> (04 Round to 2 decimal places)	001	0.00500 Inclusive	0.01500 Exclu	
<input type="checkbox"/> Total Entitlement	04 Round to 2 decimal places	001	0.00500 Inclusive	0.01500 Exclu

**Detail Screen for Selected Row**

Text	Value	Interpreted Value
Rule for Base Entl	001	
Absence quota type	09 Leave (Days)	
Sequential no.	001	
Start Date	01.01.1900	
End Date	31.12.9999	
Seniority	000 To 000	
Age	000 To 030 Years	
Employment	06.00000 (Centenwh)	

**Figure 132: Checking Customizing Settings**

You can use the RPTQUOTA\_CHECK report to display an overview of your Customizing settings.

This gives you a quick overview for the settings you made for particular employees or groupings; you can also view detailed information.

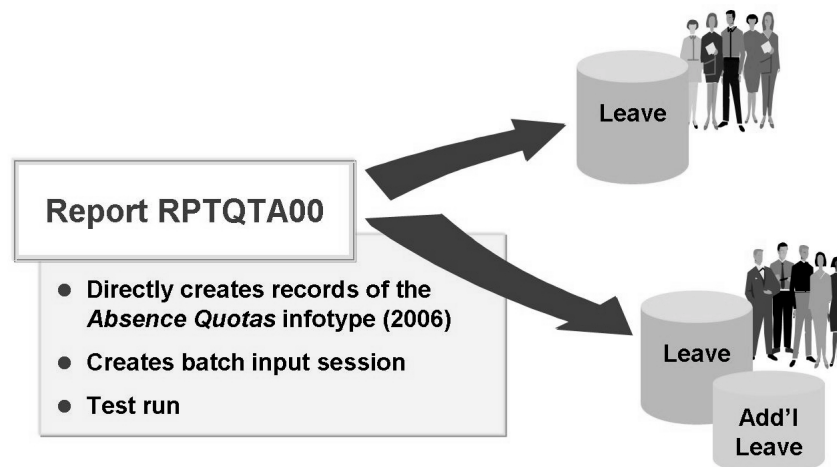
To go to the detailed view of a setting, double-click on the sheet of paper icon for the row.

You can base the selection of the report either on persons, by entering a personnel number or quota type selection rule group, or time management groupings, by specifying employee subgroup or personnel subarea groupings.

The report outputs the applicable generation rule (from table T559L) and below it all the settings that were made in the individual rules. This includes the quota types (T556A), base entitlement (T559E), validity and deduction intervals (T559V), reduction rules (T559M), and rounding rules (T559R). In addition, the absences that may cause the quota to be reduced are displayed. (Indicated as such in quota generation in table T554S).

The report is shipped in HR Support Packages for earlier releases back to 4.6B. The changes for 4.6C are contained in HR Support Package 63.

For more information about the report see SAP Note 538504 and the report documentation. To display the documentation, access transaction SA38 and choose *Goto* → *Documentation*.



**Figure 133: Report RPTQTA00 (Generate Absence Quotas)**

If generation rules have been specified, you can use the RPTQTA00 report to accrue quota entitlements in advance for groups of employees or for individuals.

To do so, you must specify a generation interval to determine the validity period of the absence quota record or records to be created.

The following options are available for specifying the validity period:

You can enter the start and end dates directly in the report selection screen to set the validity interval.

You can enter the start date. The start date serves as the key date for determining the actual validity interval according to the validity interval specified in the IMG.

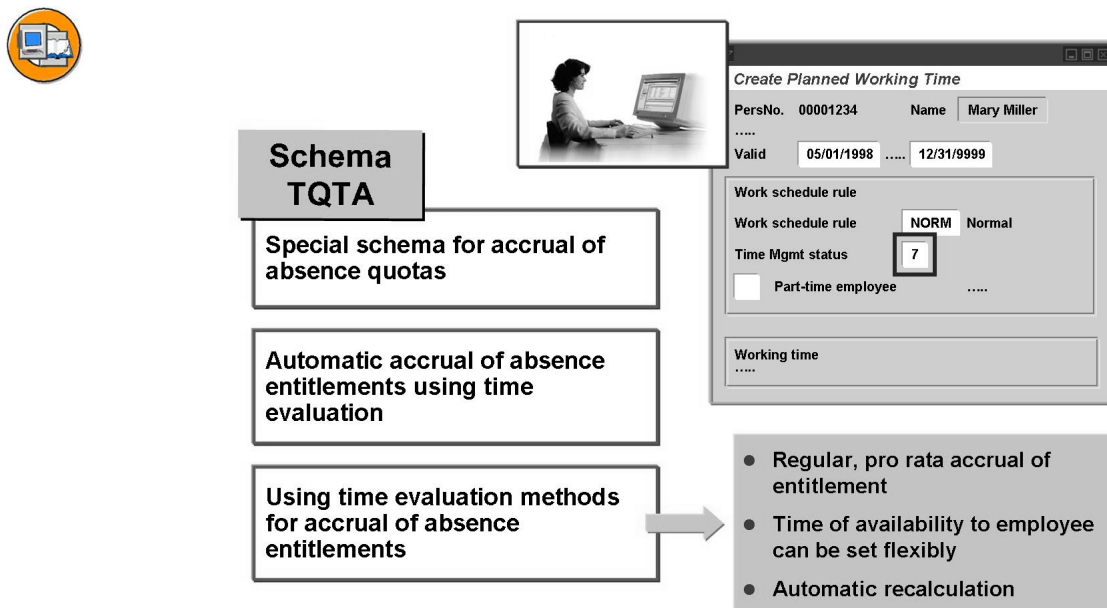
You can make no entries (neither start nor end date). The system date serves as the key date for determining the actual validity interval according to the entries in the *Validity Interval for Absence Quotas* Customizing table.

You run the RPTQTA00 report in one of the following ways:

It generates new infotype records directly in the *Absence Quotas* infotype or updates existing infotype records.

It generates a batch input session to be processed at a later time.

It is run in test mode. You can check the result in the output list.



**Figure 134: Schema TQTA**

If you want to take advantage of time evaluation functions when generating absence entitlements, even if you do not otherwise use time evaluation, you can use the standard schema **TQTA**.

All employees for whom absence entitlements are to be accrued using this schema must have the Time Management status **7** in the *Planned Working Time* infotype (0007). In payroll, status **7** (*Time evaluation without payroll integration*) is handled as status **0** (*No time evaluation*) in time management.

## Exercise 8: Creating, Accruing, and Deducting from Quotas

### Exercise Objectives

After completing this exercise, you will be able to:

- Create quota types
- Create and assign quota deduction rules
- Accrue absence entitlements

### Business Example

You create the quota types required in your enterprise (leave, educational leave, and so on). The same leave entitlement is granted to all employees on an annual basis. The amount of entitlement is dependent on employees' seniority. You create the generation rules for accruing your employees' leave entitlement. When employees take leave, you must ensure that correct amounts are deducted from their entitlements, in the correct sequence, and so on. You create and assign the applicable quota deduction rules.



**Hint:** If the system asks you to enter a country grouping, enter **99 – Rest of world**.

### Task 1:

Create an Absence Quota Type

1. Create quota type **30+##** (30 added to your group number) with the name **Leave Group ##** and quota type **70+##** (70 added to your group number) with the name **Additional leave Group ##**.

The quotas are to be managed in days, and a deduction beyond the entitlement is not permitted.

You can copy and modify quota type **09 (Leave (days))**.

*Continued on next page*

## Task 2:

Setting Up Quota Deduction

Create and assign a quota deduction rule

When your employees take leave (absence type **LE##**), each leave quota must be deducted accordingly.

The following applies:

- If an employee is entitled to additional leave (quota type **70 + ##**), this quota is to be deducted first. Then, the actual leave (quota type **30 + ##**) is to be deducted. Other absence entitlements to which the employee may be entitled must not be deducted.
  - If an employee has several quotas of the same type, then these quotas are to be deducted so that the quotas that would expire first (that is, their deduction end dates would be reached first) are also deducted first.
  - The quotas must not be deducted beyond the entitlement. Where can you create a rule of this type?
1. Define a quota deduction rule **1##** (where **##** = your group number), in which the sequence of the quotas to be deducted (first **70+##**, then **30+##**) is specified in a specific sequence. Make sure that no deduction from additional quotas is permitted.
  2. Assign your quota deduction rule at the appropriate position. Where do you make this assignment? Make sure that all above conditions are met when assigning.
  3. Activate and check quota deduction for **LE##**.

## Task 3:

Accrual of Absence Entitlements (30+## = Standard Annual Leave)

Employees in your personnel subarea are granted their leave for one year in advance. This leave entitlement depends on their seniority. The entitlement is valid for the current year, however, leave can be taken in the subsequent year. In the following steps, you configure the system to accrue employees' leave entitlement automatically using the **RPTQTA00** report.

1. Indicate that your new absence quota type **Leave** is to be accrued manually, that is, not by using time evaluation.
2. Feature QUOMO

*Continued on next page*

What does the *QUOMO* feature do, that is, what is its function? What is the return value of the feature and where is this return value referenced?

How is the decision tree of the *QUOMO* feature structured in the training system?

What return value applies to your employees Karin Anderson (**306992##**) and Tom Johnson (**306991##**)?

3. Specify base entitlements (30+##)

Set up the following leave regulation for the employees in your personnel subarea:

Employees with 0 – 5 years' seniority are entitled to 25 days of leave (quota type **30+##**) per year.

Employees with more than 5 years' seniority are entitled to 28 days of leave (quota type **30+##**) per year.

Create a base entitlement rule to represent these specifications and name it **001**. Do you need to create subrules? If so, use the subrules **001** and **002**.

Use the calendar year as the period on which the base entitlement is based.

4. Define validity and deduction intervals (30+##)

Use the current calendar year as the validity interval for the quota;

the quota can be deducted from the start of the validity period until March 31 of the subsequent year. In addition, quota deduction cannot begin until after an employee's probationary period is completed.

In which IMG steps do you specify the default values for the validity and deduction intervals? What are the intervals based on?

The deduction interval is specified for each quota type. What about the validity interval?

5. Define reduction rules for quota entitlements (30+##)

In the case of employees who join or leave the company mid-year, you want the default leave entitlement to be proportionately lower, that is, you want the entitlement to be reduced pro rata. Create an appropriate reduction rule **30+##** (where **##** = your group number). Use an appropriate name for the reduction rule, such as **Reduced by inactive days Group ##**. Use the accrual period as the base period for reduction.

**Note:**

Confirm the warning concerning the SAP namespace in this exercise. A number is used here as the "name" of the reduction rule.

6. Define rounding rules for quota selection (30+##)

*Continued on next page*

You want to round up or down to full days when determining total entitlement. Does a suitable rounding rule already exist? Which one?

7. Define generation rules for quota selection (30+##)

You want to create a selection rule for quota accrual **30+## (Leave Group ##)** for the employees in your personnel area.

What are the employee subgroup groupings and personnel subarea groupings called?

Employee subgroup grouping for time quotas:

Personnel subarea grouping for time quotas:

Personnel subarea grouping for time recording: 01

For which quota type selection rule group are the selection rule and generation rule valid?

Check the decision tree for the QUOMO feature again.

Write down the quota type selection rule group here:

For the applicable groupings and quota type selection rule group, create the selection rule **001** and name it **Leave accrual ##**. This selection rule is to be used for accruing absence quota type **30+##** (where **##** = your group number).

The following specifications are valid for this selection rule:

- It is to apply to all employees in your personnel subarea, regardless of their length of service with the company and challenge group/degree of challenge.
- The accrual period is to be one calendar year.
- Specify the rule for base entitlement that you created. Seniority is to be determined for an exact date.
- Set up pro rata reduction of quota entitlement for employees joining or leaving the enterprise mid-year.
- The total entitlement determined is to be rounded so that only full days are used.

*Continued on next page*



## Task 4:

Accruing Additional Absence Quota Entitlements (70+## = Additional Leave)

The following exercise demonstrates how entitlements of different quota types can be accrued for employees.

In some countries, this is required. In Germany, for example, challenged employees are required to be granted additional leave based on their degree of challenge. In the USA, some employees are entitled to additional leave as part of workers' compensation.

**Employees in your personnel areas are to be granted three days of additional leave per year (quota type 70+##, where ## = your group number).**

1. Specify base entitlements (70+##)

Create a base entitlement rule for quota type **70+##** (3 days' entitlement per calendar year). Name this base entitlement rule **001**. Do you need to create subrules?

Use the calendar year as the period on which the base entitlement is based.

2. Define validity and deduction intervals (70+##)

What validity interval is valid for the quota to be accrued? Deduction of the quota entitlement is to be permitted in the current year.

3. Define reduction and rounding rules for quota entitlements (70+##)

In the case of employees who join or leave the company mid-year, you want the leave entitlement to be proportionately lower, that is, you want the entitlement to be reduced pro rata.

You want to round up or down to full days when determining total entitlement.

4. Define generation rules for quota selection (70+##)

Enter a selection rule with the ID **002** for accruing additional quota **70+##** (## = your group number). Name this selection rule, for example, **Accrual addl leave 70+##**.

The following specifications are valid for this selection rule:

*Continued on next page*

- It is to apply to all employees in your personnel subarea, regardless of their length of service with the company and challenge group/degree of challenge.
  - The accrual period is to be one calendar year.
  - Specify the rule for base entitlement that you created.
  - Set up pro rata reduction of quota entitlement for employees joining or leaving the enterprise mid-year.
  - The total entitlement determined is to be rounded so that only full days are used.
5. Use RPTQUOTA\_CHECK to check generation rules
- Use the RPTQUOTA\_CHECK report to check your Customizing settings for Tom Johnson (306991##) and Karin Anderson (306992##).
- Display the error list and correct any errors in the settings as required.

## Task 5:

### Defining Quotas for Employees

1. Generate absence entitlements using RPTQTA00  
 For your employees Tom Johnson (**306991##**) and Karin Anderson (**306992##**), generate a leave quota for the current year by running the **RPTQTA00** report. Choose the *Generate batch input session* option.
2. Manually create absence entitlements without default values (**optional**)  
 If you have already completed Exercise 4, you can skip this exercise, or manually create a quota for the following year.  
 Your salaried employee Karin Johnson (306992##) is entitled to 3 days of additional leave (quota type 70+##).  
 For your salaried employee, manually create an entitlement of 3 days of additional leave (quota type 70 ##). The validity interval for this quota is the current year. The start and end of the deduction period is the same as the start and end of the validity period.

## Task 6:

### Representing Employees' Leave

1. Create a full week's leave for your salaried employee, Karin Anderson (**306992##**), next week. Enter the leave record using the absence type **LE##**.

*Continued on next page*

**Note:**

If you want to enter the leave record in the Time Manager's Workplace, use the generic time data ID **AB**, then enter the absence type **LE##** (## = your group number) in the Details area.

What amount of quota is used?

2. From which quotas is the leave deducted?

Now check the quota overview for your salaried employee for the current year.

## Solution 8: Creating, Accruing, and Deducting from Quotas

### Task 1:

Create an Absence Quota Type

1. Create quota type **30+##** (30 added to your group number) with the name **Leave Group ##** and quota type **70+##** (70 added to your group number) with the name **Additional leave Group ##**.

The quotas are to be managed in days, and a deduction beyond the entitlement is not permitted.

*Continued on next page*

You can copy and modify quota type **09 (Leave (days))**.

a) Define groupings for time quotas

In the Implementation Guide (IMG), choose *Personnel Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Setting Groupings for Time Quotas*.

- To check the assignment of employee subgroups to the grouping for time quotas, choose *Group Employee Subgroups for Time Quotas*.

Make sure that your employees' employee subgroups, **X0 (Salaried employee)** and **X1 (Hourly-wage earner)**, are both assigned to the grouping **1**.

- To check the assignment of personnel subareas to the grouping for time quotas, choose *Group Personnel Subareas for Time Quotas*.

Check whether your personnel subarea **TP##** is assigned to the grouping **01**.

b) Create absence quota types

In the Implementation Guide (IMG), choose *Personnel Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Time Quota Types → Define Absence Quota Types*.

Select the time quota type **09 (Leave (days))** and then choose **Copy**, or choose **Edit → Copy as** from the menu.

For the employee subgroup grouping for time quotas **1** and the personnel subarea grouping for time quota types **01**, enter the first absence quota type **30+##** named **Leave Group ##** and the second absence quota type **70+##** named **Additional leave Group ##** (## = your group number).

Leave the unit of time/measurement *Days* and the existing time constraint class as they are.

Do not enter anything in the *Negative deduction to* field. Quotas of the new time quota type must not be able to be deducted beyond the entitlement.

Save your entries.

## Task 2:

### Setting Up Quota Deduction

*Continued on next page*

Create and assign a quota deduction rule

When your employees take leave (absence type **LE##**), each leave quota must be deducted accordingly.

The following applies:

- If an employee is entitled to additional leave (quota type **70 + ##**), this quota is to be deducted first. Then, the actual leave (quota type **30 + ##**) is to be deducted. Other absence entitlements to which the employee may be entitled must not be deducted.
  - If an employee has several quotas of the same type, then these quotas are to be deducted so that the quotas that would expire first (that is, their deduction end dates would be reached first) are also deducted first.
  - The quotas must not be deducted beyond the entitlement. Where can you create a rule of this type?
1. Define a quota deduction rule **1##** (where **##** = your group number), in which the sequence of the quotas to be deducted (first **70+##**, then **30+##**) is specified in a specific sequence. Make sure that no deduction from additional quotas is permitted.
    - a) Create and assign a quota deduction rule

Before you can deduct from quotas, you must first create an appropriate quota deduction rule. This rule is then assigned to a counting rule.

#### Create a quota deduction rule

To create a quota deduction rule, choose *Personnel Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Quota Deduction Using Attendances/Absences* → *Define Deduction Rules for Absence and Attendance Quotas* in the IMG.

In the subsequent dialog box, choose the *Define Deduction Rules for Absence Quotas* activity.

Choose the *New entries* option, or choose *Edit* → *New entries*.

Make the following entries for the deduction rule you are creating:

Start Date: **01.01.1990**

End Date: **12/31/9999**

Grouping Employee Subgroup Grouping for Time Quota Types: **1**

*Continued on next page*

Grouping Employee Subgroup Grouping for Time Quota Types: **01**

Deduction rule: **1##** (Deduction rule group ##)

Unit of relevant absence quota types: **Days**

In the *Absence quota types* section:

**70+##** in the first row

**30+##** in the row below it.

In the *Quota type sequence for further deduction* section, choose the *No further deduction* option.

In the *Deduction priority* section, enter **1** as the priority for *Quota types*, and **2** as the priority for *Deduction to*. Leave the default value *ascending* for the sequence.

Save your entries.

2. Assign your quota deduction rule at the appropriate position. Where do you make this assignment? Make sure that all above conditions are met when assigning.

- a) Assign the quota deduction rule to a counting rule

To assign the quota deduction rule to a counting rule, choose the IMG path:

***Personnel Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Quota Deduction Using Attendances/Absences → Assign Deduction Rules to Counting Rules.***

Select the counting rule **1##** that you created in Exercise 1 of the previous unit, and choose *Details* (second button from the left in the icon bar) or *Goto → Details* from the menu.

Scroll to the end of the counting rule.

In both the *Deduction rule* and *Absence quotas* sections, enter the quota deduction rule **1##** that you just created (## = your group number). Specify the quota deduction rule only in the *Within entitlement* fields. This makes sure that the quotas are not deducted beyond the available entitlement.

Save your entries.

*Continued on next page*

3. Activate and check quota deduction for **LE##**.

a) Activate quota deduction for an absence type

To activate and check quota deduction for the applicable absence type **LE##** (## = your group number), choose *Personnel Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Absence Counting* → *Assign Counting Rules to Absence Types* in the IMG.

Select the absence type you previously created, **LE## (Leave Group ##)**, and then choose *Details* button or *Goto* → *Details* from the menu. Check whether your counting rule **1##** is assigned to this absence type and if quota deduction is already activated. You should have already done this in Exercise 1 of the previous unit.

### Task 3:

Accrual of Absence Entitlements (30+## = Standard Annual Leave)

Employees in your personnel subarea are granted their leave for one year in advance. This leave entitlement depends on their seniority. The entitlement is valid for the current year, however, leave can be taken in the subsequent year. In the following steps, you configure the system to accrue employees' leave entitlement automatically using the **RPTQTA00** report.

1. Indicate that your new absence quota type **Leave** is to be accrued manually, that is, not by using time evaluation.

a) In the IMG, choose *Personnel Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Automatic Accrual of Absence Quotas* → *Permit Quota Generation Without Time Evaluation*.

Check if the *No generat.* option is selected for your time quota type **30+## Leave**.

2. Feature QUOMO

What does the *QUOMO* feature do, that is, what is its function? What is the return value of the feature and where is this return value referenced?

How is the decision tree of the *QUOMO* feature structured in the training system?

*Continued on next page*



What return value applies to your employees Karin Anderson (**306992##**) and Tom Johnson (**306991##**)?

- a) Function of the QUOMO feature:

The QUOMO feature specifies which quota type selection rule group employees are to be assigned to depending on their organizational assignment. Quota type selection rules will be specified for this quota type selection rule group in a later step to specify how absence quotas are accrued.

**Note:**

The quota type selection rule group can also be assigned in the time evaluation schema if time evaluation is used to accrue absence entitlements.

- b) Structure of the decision tree of the QUOMO feature in the training system:

In the IMG, choose *Personnel Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Calculating Absence Entitlements → Rules for Generating Absence Quotas → Specify Rule Groups for Quota Type Selection*.

In the subsequent dialog box, choose the *Modify Feature QUOMO* option.

The decision tree for the QUOMO feature appears.

**Note:**

You can also maintain the feature directly by accessing transaction **PE03**.

**Note:**

The decision tree of the feature is already modified for the following exercise as follows:

In the decision tree, the country grouping is queried first. For the country grouping **99 (Rest of world)**, the system then queries the personnel area.

The personnel subarea is then queried for the personnel area **CABB**.

The return value **##+30** is set for the country grouping **99**, personnel area **CABB** and the personnel subarea **TP##** (**##** = your group number). This means that the quota type selection rule group **##+30** (you're your group number) applies to the employees in personnel subarea **TP##**.

3. Specify base entitlements (30+##)

*Continued on next page*

Set up the following leave regulation for the employees in your personnel subarea:

Employees with 0 – 5 years' seniority are entitled to 25 days of leave (quota type **30+##**) per year.

Employees with more than 5 years' seniority are entitled to 28 days of leave (quota type **30+##**) per year.

Create a base entitlement rule to represent these specifications and name it **001**. Do you need to create subrules? If so, use the subrules **001** and **002**.

Use the calendar year as the period on which the base entitlement is based.

- a) In the IMG, choose *Personnel Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Define Base Entitlements*.

In the subsequent dialog box, choose the *Base Entitlement for Absence Quota Generation* activity.

To create new rules for base entitlements, choose *New entries* or *Edit* → *New entries* from the menu.

Create a base entitlement rule **001** for the quota type **30+##** **Leave group ##** and call it **Base entitlement leave group ##**. You have to create two subrules (**001** and **002**) because your employees have different base entitlements depending on their level of seniority.

- Base entitlement for employees with 0 - 5 years' seniority

Make the following entries for the first subrule **001**:

Start Date: **01/01/1990**

End Date: **12/31/9999**

Employee subgroup grouping for time quotas: **1**

Personnel subarea grouping for time quotas: **01**

Personnel subarea grouping for time recording: **01**

Absence quota type: **30+##**

Rule for base entitlement: **001**

Sequential number: **001**

Seniority: **0 – 5 years**

Entitlement – Constant: **25 (days)**

Related to period: **Calendar year**

*Continued on next page*

Save your entries and return by choosing *Back*.

- Base entitlement for employees with seniority of more than 5 years

To create subrule **002**, select your entry for quota type **30+##** and then choose *Copy*.

Make the following changes:

Sequential number: **002**

Seniority: **5 – 99 years**

Entitlement – Constant: **28 days**

Related to period: **Calendar year**

Choose *Enter* to confirm your entries and then *Back*.

4. Define validity and deduction intervals (30+##)

Use the current calendar year as the validity interval for the quota;

the quota can be deducted from the start of the validity period until March 31 of the subsequent year. In addition, quota deduction cannot begin until after an employee's probationary period is completed.

In which IMG steps do you specify the default values for the validity and deduction intervals? What are the intervals based on?

The deduction interval is specified for each quota type. What about the validity interval?

a) Define validity interval

To determine the validity intervals for the quota entitlements, choose *Personnel Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Calculating Absence Entitlements → Rules for Generating Absence Quotas → Setting Up Methods for Quota Accrual → Set Up Automatic Accrual Using RPTQTA00* in the IMG.

In the following dialog box, choose the *Set Validity Interval for Quota Accrual* activity.

Choose *New entries* and enter the following data:

Employee subgroup grouping for time quotas: **1**

Personnel subarea grouping for time quotas: **01**

Quota type selection rule grouping: **30+##**

Valid from date: **Start of calendar year**

*Continued on next page*

Valid to date: **End of calendar year**

Save your entries.

**Note:**

The validity interval for the quota to be accrued is defined for a quota type selection rule group, that is, the same validity interval is the default for all quotas with this quota type selection rule group (according to rules).

b) Define deduction interval

To determine deduction interval for the quota **30+## Leave group ##**, choose *Personnel Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Calculating Absence Entitlements → Rules for Generating Absence Quotas → Determine Validity and Deduction Periods*.

Choose *New entries* and enter the following data:

Employee subgroup grouping for time quotas: **1**

Personnel subarea grouping for time quota types: **01**

Absence quota type **30+##**

Deduction interval:

Deduction from: **Start of validity interval**

No deduction before: **Probationary period completed**

Deduction to: **End of validity interval**

Relative position: **3 months**

Save your entries.

**Note:**

Unlike the validity interval, the deduction interval is determined for each quota type. In this way, a deduction interval can be set for individual quota types.

5. Define reduction rules for quota entitlements (30+##)

In the case of employees who join or leave the company mid-year, you want the default leave entitlement to be proportionately lower, that is, you want the entitlement to be reduced pro rata. Create an appropriate reduction rule **30+##** (where ## = your group number). Use an appropriate name for the reduction rule, such as **Reduced by inactive days Group ##**. Use the accrual period as the base period for reduction.

**Note:**

*Continued on next page*

Confirm the warning concerning the SAP namespace in this exercise. A number is used here as the “name” of the reduction rule.

- a) Define reduction rules for quota entitlements (30+##)

To define the applicable reduction rule for quota entitlements, choose *Personnel Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Calculating Absence Entitlements → Rules for Generating Absence Quotas → Define Rules for Reducing Quota Entitlements* in the IMG.

In the subsequent dialog box, choose the *Define Reduction Rules* activity.

Choose *New entries*.

Enter the following data:

**Reduction rule 30+##**(Reduction rule for inactive days group ##)

Reduction rule for part-time employees:

Basic data: **No reduction**

Reduction rule for inactive days:

Reference period: **Accrual period**

Percentage of inactive calendar days: **0%**

From percentage: **Proportionate reduction**

Save your entries. Confirm the warning message by choosing *Enter*.

**Note:**

Choose *Enter* to confirm the warning concerning the SAP namespace in this exercise. A number is used here as the “name” of the reduction rule.

6. Define rounding rules for quota selection (30+##)

*Continued on next page*

You want to round up or down to full days when determining total entitlement. Does a suitable rounding rule already exist? Which one?

- a) Define rounding rules for quota entitlements (30+##)

To check whether an appropriate rounding rule already exists to round up or down to whole values, choose *Personnel Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Define Rules for Rounding Quota Entitlements* in the IMG.

The rounding rule **01** corresponds to the specifications required: You can round up and down to whole values.

7. Define generation rules for quota selection (30+##)

You want to create a selection rule for quota accrual **30+## (Leave Group ##)** for the employees in your personnel area.

What are the employee subgroup groupings and personnel subarea groupings called?

Employee subgroup grouping for time quotas:

Personnel subarea grouping for time quotas:

Personnel subarea grouping for time recording: 01

For which quota type selection rule group are the selection rule and generation rule valid?

Check the decision tree for the QUOMO feature again.

Write down the quota type selection rule group here:

For the applicable groupings and quota type selection rule group, create the selection rule **001** and name it **Leave accrual ##**. This selection rule is to be used for accruing absence quota type **30+##** (where ## = your group number).

The following specifications are valid for this selection rule:

*Continued on next page*

- It is to apply to all employees in your personnel subarea, regardless of their length of service with the company and challenge group/degree of challenge.
- The accrual period is to be one calendar year.
- Specify the rule for base entitlement that you created. Seniority is to be determined for an exact date.
- Set up pro rata reduction of quota entitlement for employees joining or leaving the enterprise mid-year.
- The total entitlement determined is to be rounded so that only full days are used.

a) Define generation rules for quota selection (30+##)

**Note:**

The QUOMO feature (see 2-2) is used to determine – based on employees' organizational assignment – the quota type selection rule group that is to apply to the employees. Selection rules are then stored for this quota type selection rule group to regulate the quota accrual.

For this reason, check the decision tree for the QUOMO feature to see which quota type selection rule group was set for the employees in your personnel subarea. The quota type selection rule group should be **30+##** (## = your group number). (To access the decision tree of the QUOMO feature in the IMG, choose *Personnel Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Specify Rule Groups for Quota Type Selection*.)

To specify the generation rules for quota accrual in the IMG, choose *Personnel Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Define Generation Rules for Quota Type Selection*.

Choose *New entries* and enter the following data:

Start Date: **01.01.1990**

End Date: **12/31/9999**

Employee subgroup grouping for time quotas: 1

Personnel subarea grouping for time quotas: **01**

*Continued on next page*

Personnel subarea grouping for time recording: **01**

Quota type selection rule group: **30+##**

Selection rule: **001** (Leave accrual ##)

Absence quota type: **30+## (Leave Group ##)**

- In the *Base Entitlement* tab page, enter:

**Base entitlement:**

Rule for base entitlement: **001**

Key date for determining seniority: **Exact date**

- In the *Applicability* tab, adopt the default settings.
- In the *Accrual period* tab, select *Calendar year*.
- In the *Accrual entitlement* tab, enter:

Reduction rule: **30+##**

- In the *Total entitlement* tab, enter:

Rounding rule: **01**

Save your entries.

**Note:**

Using the dialog structure in the left section of the screen, you can access the relevant views for generation rules.

## Task 4:

Accruing Additional Absence Quota Entitlements (70+## = Additional Leave)

The following exercise demonstrates how entitlements of different quota types can be accrued for employees.

In some countries, this is required. In Germany, for example, challenged employees are required to be granted additional leave based on their degree of challenge. In the USA, some employees are entitled to additional leave as part of workers' compensation.

**Employees in your personnel areas are to be granted three days of additional leave per year (quota type 70+##, where ## = your group number).**

1. Specify base entitlements (70+##)

Create a base entitlement rule for quota type **70+##** (3 days' entitlement per calendar year). Name this base entitlement rule **001**. Do you need to create subrules?

*Continued on next page*



Use the calendar year as the period on which the base entitlement is based.

a) Specify base entitlements (70+##)

In the IMG, choose *Personnel Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Define Base Entitlements*.

In the subsequent dialog box, choose the *Base Entitlement for Absence Quota Generation* activity.

To create new rules for base entitlements, choose *New entries* or *Edit* → *New entries* from the menu.

- Define base entitlements

In this activity, you create a base entitlement rule 001 for the quota type **70+## Leave group ##** and call it **Base entitlement addl leave group ##**. This rule contains no subrules.

Make the following entries for rule **001**:

Start Date: **01.01.1990**

End Date: **31.12.9999**

Employee subgroup grouping for time quotas: **1**

Personnel subarea grouping for time quotas: **01**

Personnel subarea grouping for time recording: **01**

Absence quota type: **70+##**

Rule for base entitlement: **001**

Sequential number: -

Entitlement – Constant: **3 days**

Related to period: **Calendar year**

Save your entries and return by choosing *Back*.

2. Define validity and deduction intervals (70+##)

*Continued on next page*

What validity interval is valid for the quota to be accrued? Deduction of the quota entitlement is to be permitted in the current year.

a) Define validity interval

Because the validity interval is set for each quota type selection rule group, and you have already done this in 2-4, you do not have to make any other entries.

b) Define deduction interval

To determine deduction interval for the quota **70+## (additional leave)**, choose *Personnel Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Calculating Absence Entitlements → Rules for Generating Absence Quotas → Determine Validity and Deduction Periods*.

Choose *New entries* and enter the following data:

Employee subgroup grouping for time quotas: **1**

Personnel subarea grouping for time quotas: **01**

Absence quota type **70+##**

Deduction interval:

Deduction from: **Start of validity interval**

Deduction to: **End of validity interval**

Rel. position: -

Save your entries.

3. Define reduction and rounding rules for quota entitlements (70+##)

In the case of employees who join or leave the company mid-year, you want the leave entitlement to be proportionately lower, that is, you want the entitlement to be reduced pro rata.

You want to round up or down to full days when determining total entitlement.

a) Use the reduction and rounding rules that you already created in 2-5 and 2-6.

Reduction rule: **30+## (Reduction rule for inactive days group ##)**

Rounding rule: **01 Rounding rule: To nearest whole number**

4. Define generation rules for quota selection (70+##)

Enter a selection rule with the ID **002** for accruing additional quota **70+##** (## = your group number). Name this selection rule, for example, **Accrual addl leave 70+##**.

*Continued on next page*

The following specifications are valid for this selection rule:

- It is to apply to all employees in your personnel subarea, regardless of their length of service with the company and challenge group/degree of challenge.
  - The accrual period is to be one calendar year.
  - Specify the rule for base entitlement that you created.
  - Set up pro rata reduction of quota entitlement for employees joining or leaving the enterprise mid-year.
  - The total entitlement determined is to be rounded so that only full days are used.
- a) In the IMG, choose *Personnel Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Calculating Absence Entitlements → Rules for Generating Absence Quotas → Define Generation Rules for Quota Type Selection*.

Choose *New entries* and enter the following data:

Start Date: **01.01.1990**

End Date: **12/31/9999**

Employee subgroup grouping for time quotas: **1**

Personnel subarea grouping for time quotas: **01**

Personnel subarea grouping for time recording: **01**

Quota type selection rule group: **30+##**

Selection rule: **002** (Accrual of additional leave)

Absence quota type: **70+##** (Additional leave)

- In the *Base Entitlement* tab page, enter:  
Rule for base entitlement: **001**
  - In the *Applicability* tab, adopt the default settings.
  - In the *Accrual period* tab, select *Calendar year*.
  - In the *Accrual entitlement* tab, enter: Reduction rule: **30+##**
  - In the *Total entitlement* tab, enter: Rounding rule: **01**
- Save your entries.

*Continued on next page*

5. Use RPTQUOTA\_CHECK to check generation rules

Use the RPTQUOTA\_CHECK report to check your Customizing settings for Tom Johnson (306991##) and Karin Anderson (306992##).

Display the error list and correct any errors in the settings as required.

- a) To access the report, choose the menu path *System → Services → Reporting* or go to transaction *SE38*. Enter the report name **RPTQUOTA\_CHECK** and choose *Execute*.

In the report selection screen, choose selection *by personnel number*, and enter the first personnel number, **306991##** (Tom Johnson).

In the *Selection of Quotas* section, select generation by RPTQTA00 report and default values.

Execute the report.

Check the settings in the report output. Choose the *Error List* button to display any errors.

If there are errors, correct them in the Implementation Guide.

Repeat the process for your second personnel number, **306992##** (Karin Anderson).

## Task 5:

Defining Quotas for Employees

1. Generate absence entitlements using RPTQTA00

For your employees Tom Johnson (**306991##**) and Karin Anderson (**306992##**), generate a leave quota for the current year by running the **RPTQTA00** report. Choose the *Generate batch input session* option.

- a) Generate absence entitlements using RPTQTA00

In the IMG, choose *Personnel Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Calculating Absence Entitlements → Setting Up Methods for Quota Accrual → Set Up Automatic Accrual Using Report RPTQTA00*.

In the subsequent dialog box, choose the *Set Up Report Variants for Absence Quota Accrual* activity.

The RPTQTA00 report is preset in the following screen.

Choose the *Execute* button or the menu path *Program → Execute*.

In the selection screen for the report, choose the following options:

*Continued on next page*

Period: **Current year**

Selection:

EmployeeID **306991##** and **306992##** (## = your group number)

Generation type: **Batch input**

Choose the *Execute* button or the menu path *Program → Execute*.

For employees to receive their leave entitlements, you have to run the generated batch input session.

To do so, choose *System → Services → Batch Input → Sessions*.

In the subsequent screen, select the session you created and choose *Process session*.

In the subsequent dialog box, choose the *Display errors only* option and confirm by choosing *Enter*.

The batch input session runs and generates leave entitlement for the appropriate employees.

To check the leave entitlement, choose *Human Resources → Time Management → Administration → Time Data → Display* from the menu.

Enter the personnel number of one of your employees (**306991##** or **306992##**) or use the possible entries help.

In the *Time Quotas* tab, select the *Absence quotas* option; choose *Current year* as the period.

Choose the *Overview* button.

The employee's leave entitlement ought to be listed.

Similarly, check the leave entitlement of your second employee.

2. Manually create absence entitlements without default values (**optional**)

If you have already completed Exercise 4, you can skip this exercise, or manually create a quota for the following year.

Your salaried employee Karin Johnson (306992##) is entitled to 3 days of additional leave (quota type 70+##).

*Continued on next page*

For your salaried employee, manually create an entitlement of 3 days of additional leave (quota type 70 ##). The validity interval for this quota is the current year. The start and end of the deduction period is the same as the start and end of the validity period.

- a) Manually create absence entitlements without default values (optional)

Choose **Human Resources** → **Time Management** → **Administration** → **Time Data** → **Maintain**.

Enter personnel number **306992##** (## = your group number) for your salaried employee in the *Personnel No.* field or use the possible entries help.

From the *Time Quotas* tab, choose the *Absence quotas* option. Choose *Current year* as the period.

Choose the **Create** button, or **Edit** → **Create** from the menu.

In the *Create Absence Quotas* screen (infotype 2006), enter quota type **70+## Additional leave** in the *Type* field.

In the *Number* field, enter **3** (for 3 days).

Make no entries in the *Deduction from* and *Deduction to* fields because the deduction interval is to be the same as the validity interval.

Save your entries.

## Task 6:

### Representing Employees' Leave

1. Create a full week's leave for your salaried employee, Karin Anderson (**306992##**), next week. Enter the leave record using the absence type **LE##**.

#### Note:

If you want to enter the leave record in the Time Manager's Workplace, use the generic time data ID **AB**, then enter the absence type **LE##** (## = your group number) in the Details area.

*Continued on next page*

What amount of quota is used?

a) Using infotype maintenance:

To create the absence *Leave* for your employees in the system, choose *Human Resources* → *Time Management* → *Administration* → *Time Data* → *Maintain*.

In the *Personnel number* field, enter **306992##** as the personnel number for your salaried employee or use the possible entries help.

In the *Working Times* tab, choose the *Absences* option and enter the absence type **LE## (Leave Group ##)** in the *STy* field.

In the *Period* section, enter the start date of the absence as the Monday of the following week, and the end date of the absence the Friday of that week in the *Period from* and *To* fields.

Choose the **Create** button, or *Edit* → **Create** from the menu.

The payroll days are displayed in the *Quota used* field.

Choose *Goto* → *Deduction* to check the quotas from which the absence was deducted for this period.

Save your entries.

Using the Time Manager's Workplace:

To access the **Time Manager's Workplace**, choose *Human Resources* → *Time Management* → *Administration* → *Time Manager's Workplace*.

To add Karin Anderson (**306992##**) temporarily to the employee list, click on the *Employee List* button in the *Employee List* screen area, and choose *Temporarily insert employee*. Enter the personnel number **306992##** (## = your group number) for Karin Anderson and then choose *Enter*.

In the *Time Data* area, choose *Create details* (second button from the left). Enter the time data ID **AB** in the *Details* area and the corresponding period (Monday through Friday of the following week). Enter **LE##** (## = your group number) as the absence type.

Save your entries.

2. From which quotas is the leave deducted?

*Continued on next page*

Now check the quota overview for your salaried employee for the current year.

- a) To display the quota overview for your salaried employee, choose *Human Resources → Time Management → Administration → Time Data → Quota Overview*.

In the *Personnel number* field, enter the personnel number of your salaried employee.

In the *Selection dates* tab, choose the *Calendar year* option in the *Selection intervals* section.

Choose the *Absence Quotas* tab and check which quotas exist and which have already been used.





## Lesson Summary

You should now be able to:

- Describe the methods for accrual of attendance and absence quotas
- Determine default values to accrue quota entitlements

## Lesson: Quota Compensation

### Lesson Overview

In this lesson, you learn about the quota overview and quota compensation.



### Lesson Objectives

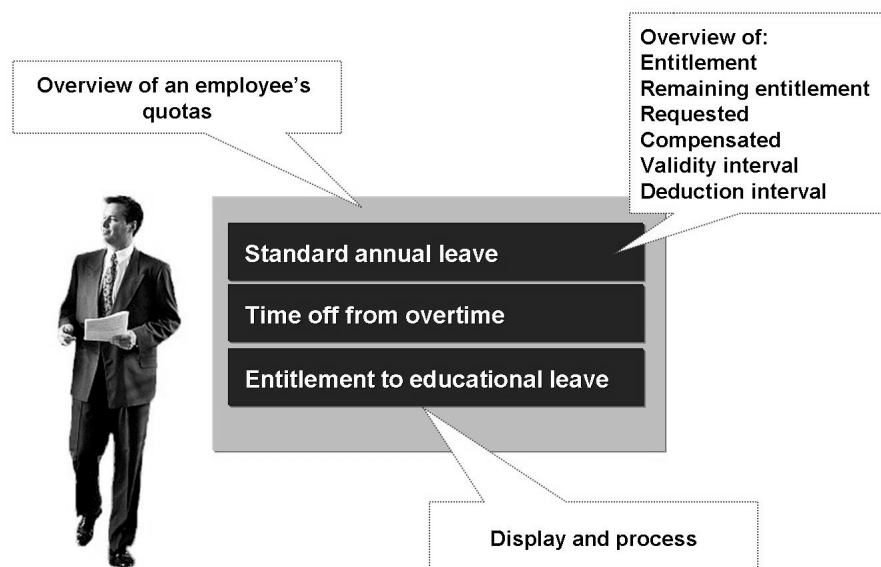
After completing this lesson, you will be able to:

- Use the quota overview
- Explain how quota entitlements are compensated

### Business Example

You can also remunerate employees for remaining unused absence entitlements.

### Quota Overview



**Figure 135: Quota Overview**

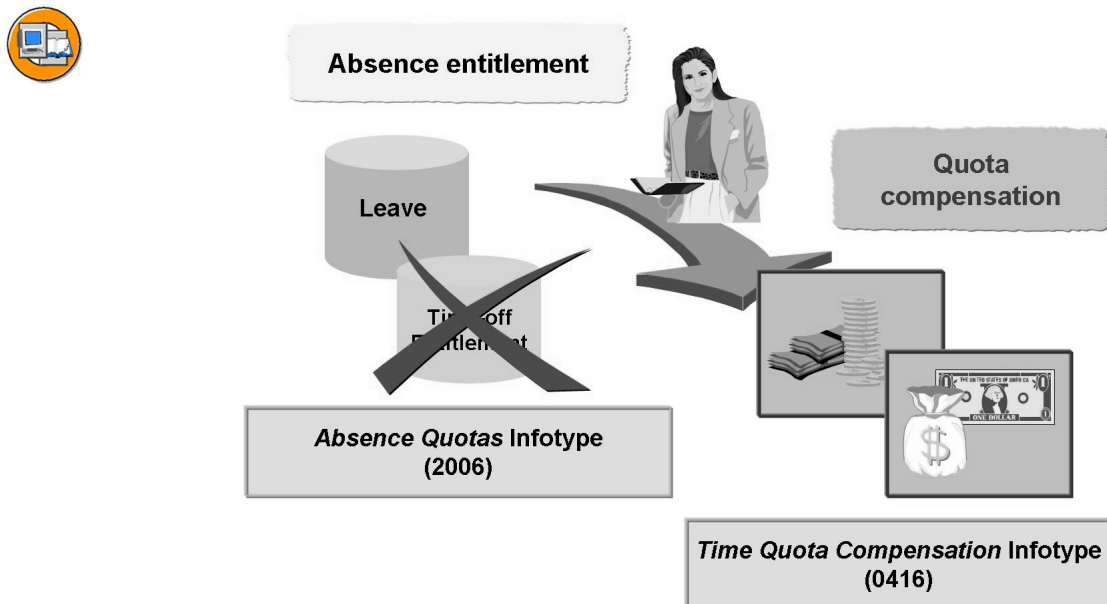
You can access the quota overview from the *Time data* menu. You can use this function to maintain or display an employee's attendance and absence quotas.

The quota overview allows you to display or maintain the quotas that are assigned to an employee in a particular period. The overview includes the total entitlement, requested and remaining days, validity interval, and deduction interval of the quota, as well as an indicator showing whether the entitlement was accrued manually or automatically.

In the quota overview, you can select a row containing a quota and display more detailed information.

You can correct the manually recorded quotas (that is, those that are not accrued in time evaluation). You can also delete manually recorded quotas.

You can branch to the list overview to display or maintain the attendances/absences to be deducted.



**Figure 136: Quota Compensation**

In the *Quota Compensation* infotype (0416), you can remunerate employees for remaining absence entitlements that were not used up by absences.

To compensate quotas, you specify various methods in Customizing that simplify recording of quota compensation. Three different processes for deduction are available:

Deduction according to an absence quota deduction rule for several absence quotas

Deduction of all absence quotas of one type that are deductible as of a key date for compensation

Deduction of absence quotas recorded manually

In addition to determining which quotas are to be compensated, the amount of the compensation must also be determined. You have to assign an appropriately configured wage type for valuation in payroll.

When compensation records are entered, the quota or quotas to be compensated are reduced by the specified value. The changes made to the quota remainder are indicated directly in the infotype.

Records of the *Quota Compensation* infotype are valuated directly in the gross part of payroll.



## Lesson Summary

You should now be able to:

- Use the quota overview
- Explain how quota entitlements are compensated



## Unit Summary

You should now be able to:

- Set up attendance and absence quota types
- Set up deduction from quota entitlements
- Describe the methods for accrual of attendance and absence quotas
- Determine default values to accrue quota entitlements
- Use the quota overview
- Explain how quota entitlements are compensated



## Test Your Knowledge

1. The validity of a quota specifies the period in which employees can use the quota.  
*Determine whether this statement is true or false.*
  - ☐ True
  - ☐ False
  
2. Quota deduction has to be activated for the relevant absence or attendance types.  
*Determine whether this statement is true or false.*
  - ☐ True
  - ☐ False
  
3. Quota entitlements can be filled using generation rules or default values.  
*Determine whether this statement is true or false.*
  - ☐ True
  - ☐ False
  
4. A quota compensation reduces the remaining entitlement for a quota.  
*Determine whether this statement is true or false.*
  - ☐ True
  - ☐ False



## Answers

1. The validity of a quota specifies the period in which employees can use the quota.

**Answer:** False

The deduction interval (deduction from and to) determines the period in which the quota can be used. The deduction interval need not be the same as the validity period.

2. Quota deduction has to be activated for the relevant absence or attendance types.

**Answer:** True

Quota deduction has to be activated for, and a counting rule assigned to, each attendance or absence type that is to be deducted from a quota.

3. Quota entitlements can be filled using generation rules or default values.

**Answer:** True

Rules are used for generating quota accrual using the RPTIME00 and RPTQTA00 reports. Default values are used when entering data manually.

4. A quota compensation reduces the remaining entitlement for a quota.

**Answer:** True

The changes made to the quota remainder are indicated directly in the infotype.



# Unit 9

## Time Manager's Workplace

### Unit Overview

This unit provides an overview of the functions of the Time Manager's Workplace and how to configure them.



### Unit Objectives

After completing this unit, you will be able to:

- Explain the functions of the Time Manager's Workplace
- Customize the TMW to include the tasks and functions of the time administrators in your enterprise

### Unit Contents

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## Lesson: Functions of the Time Manager's Workplace

### Lesson Overview

This lesson provides an overview of the functions in the Time Manager's Workplace.



### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the functions of the Time Manager's Workplace

### Business Example

Time recording is decentralized in your company. Supervisors, foremen, and secretaries in individual departments manage the time data for a group of employees, in addition to their other responsibilities. You want time administrators to use the Time Manager's Workplace to record time data.

### Introduction

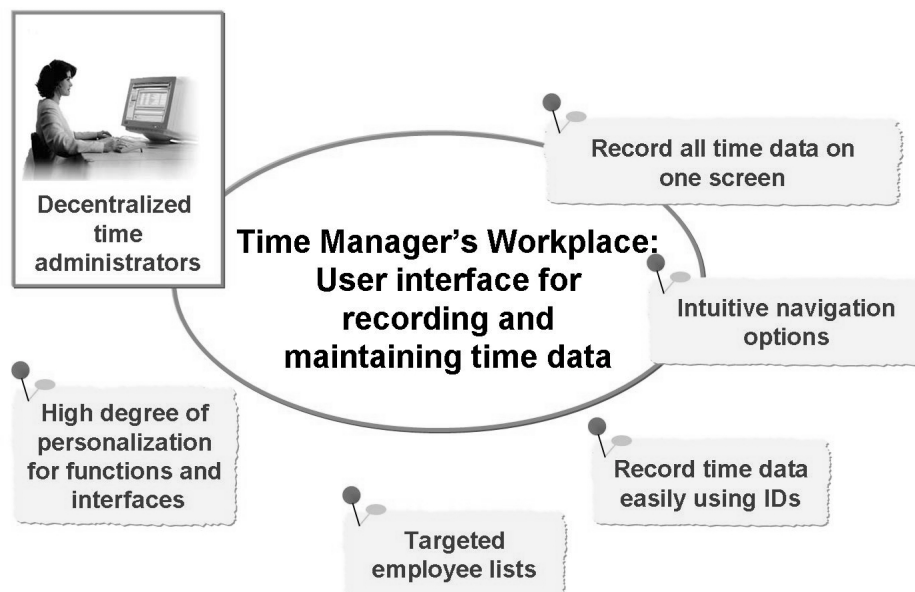


Figure 137: TMW: Introduction

The *Time Manager's Workplace* (TMW) is a user interface that optimizes the recording and maintaining of time data for decentralized time administrators.

The role of a decentralized time administrator is usually fulfilled by supervisors, foremen, administrative assistants or secretaries in their own departments on site. These groups of employees maintain time data for a manageable number of other employees, in addition to their usual tasks.

The *Time Manager's Workplace* user interface was therefore designed to be easy to learn and user-friendly. Some advantages of using the TMW are:

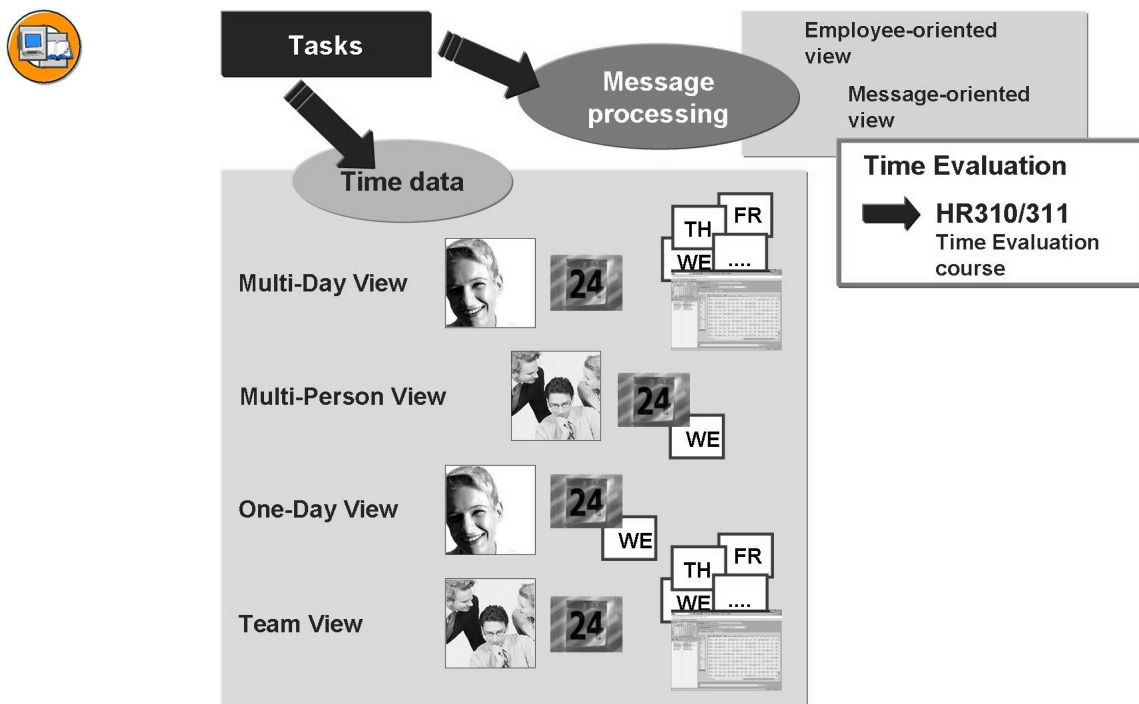
All time data can be entered, corrected, or supplemented on one screen

Intuitive navigation options

Time data is recorded using easily recognizable time data IDs

Time administrators can toggle between different views (multi-day, multi-person, one-day, and team view) to maintain time data.

The Time Manager's Workplace can be personalized, that is, you can customize the TMW to suit each user's tasks, with the applicable functions available.



**Figure 138: Task Areas and Views**

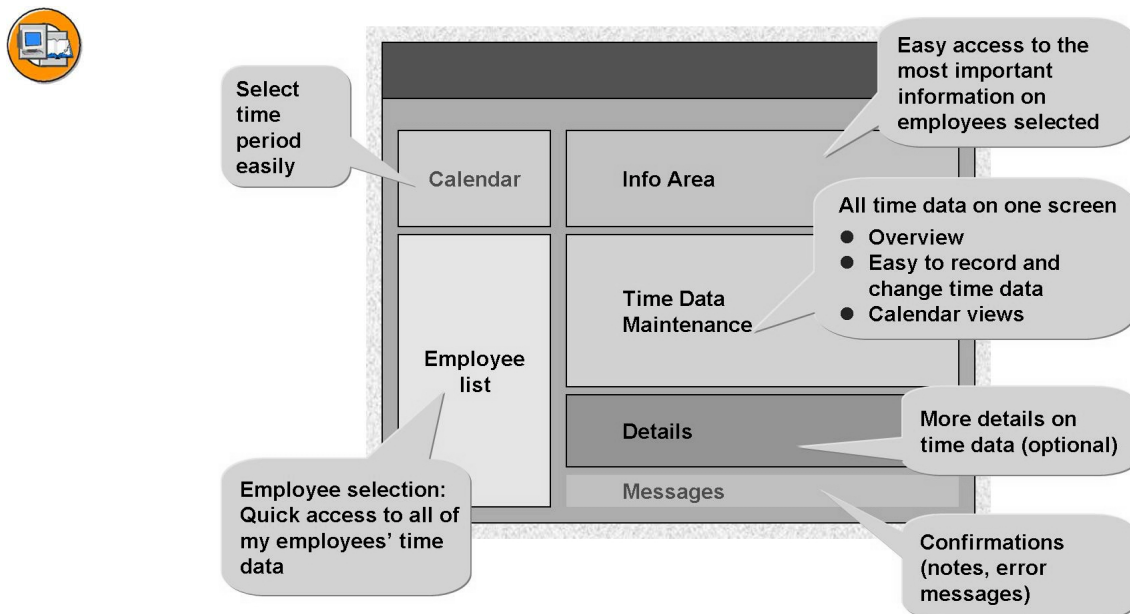
The Time Manager's Workplace provides an integrated user interface to maintain time data and process time evaluation messages. The standard system includes the *Time Data Maintenance* and *Message Processing* tasks.

Using time data maintenance, your decentralized time administrators can enter, correct, or complete time data for the employees assigned to them. There are various views (such as the multi-day, multi-person, one-day, and team view) available for the time administrators to maintain this time data.

The message processing function in the TMW provides time administrators with a comprehensive tool with which they can assess and process messages issued during time evaluation. Time administrators can toggle between a message-oriented view and an employee-oriented view when processing the messages.

The appropriate screen layout is provided for each of these tasks. These layouts can also be used as templates for your own customized layouts. The actual screen layouts and scope of functions displayed in the TMW can be modified in Customizing according to your company-specific requirements.

In this course, we will only go into detail on the scope of functions available and the Customizing steps for the *Time Data Maintenance* task (not for *Message Processing*). The *Message Processing* task is covered in the courses for Time Evaluation (HR310 and HR311).



**Figure 139: TMW: Layout and Screen Areas**

The layout of the screen areas for the *Time Data Maintenance* task in the TMW is displayed in the slide above. The basic structure is similar for the *Message Processing* task, which provides users with consistency.

The *Calendar* is used to select the time period for which time data is to be entered.

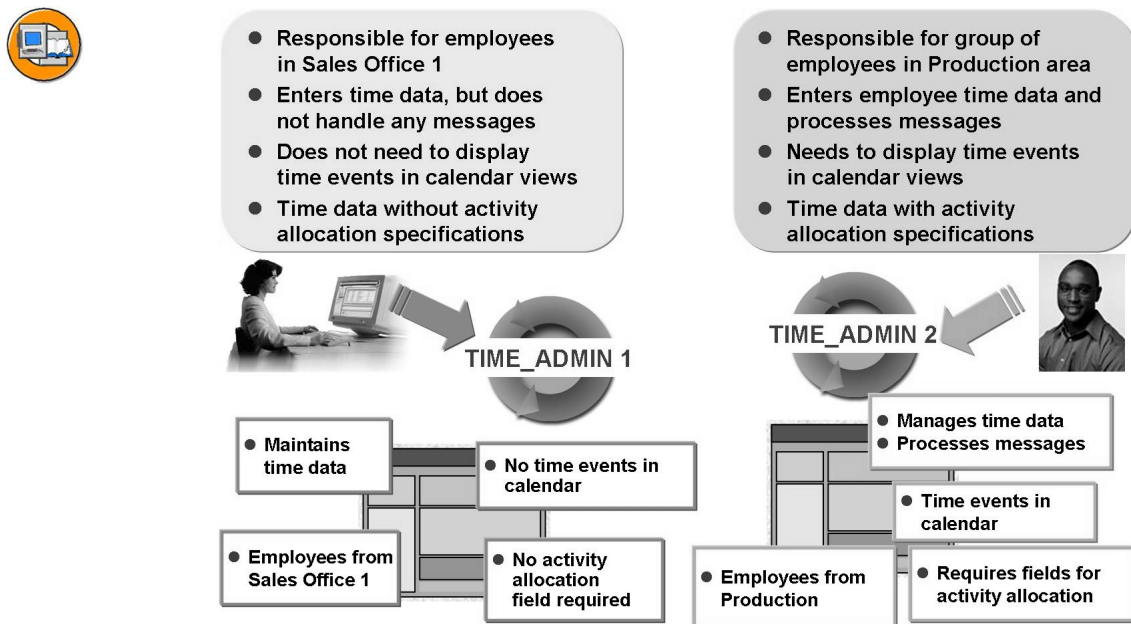
The *Employee List* contains the employees assigned to the time administrator. Time administrators can select the employee or employees from this list for whom they want to enter or change time data.

They can display additional information for any selected employee in the *Info Area* (such as details on master data or time accounts).

In the *Time Data* area, time administrators enter and maintain time data using intuitive time data IDs (such as "ILL" for illness or "LV" for leave).

Any additional specification for the time data can be entered in the *Details* area (such as activity allocation specifications for an attendance), if required. A selection of tabs appears on the screen related to the type of time data you enter; you can further specify your time entries on these tabs.

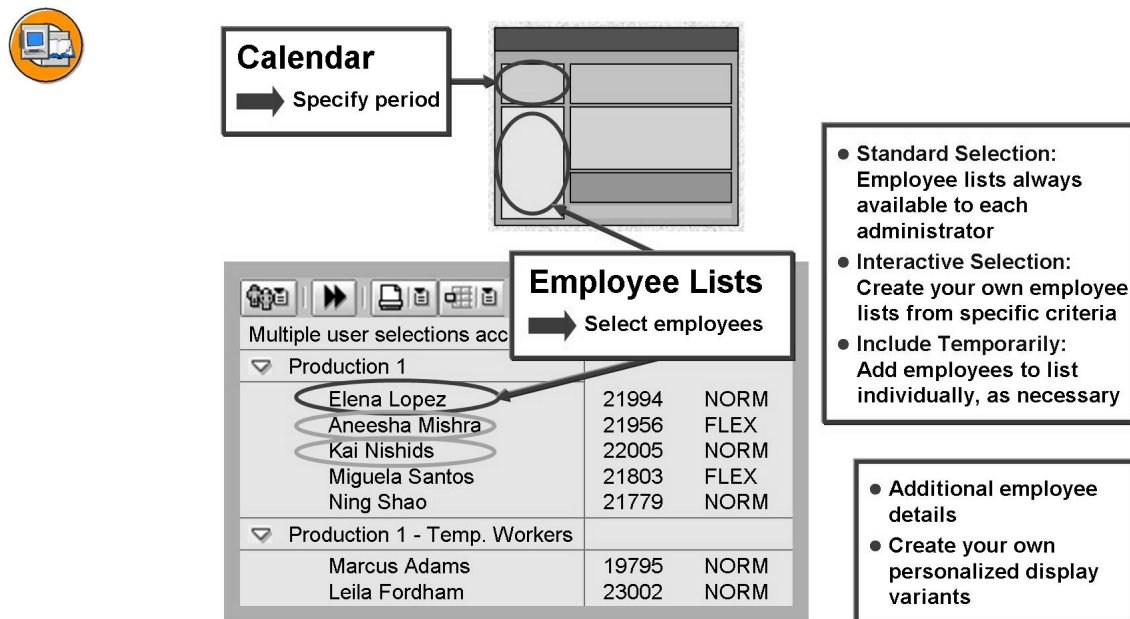
The *Messages* area contains any messages or confirmations concerning time data entered by the time administrators. These messages can be informational, warning, or error messages.



**Figure 140: Customizing the TMW for Time Administrators' Tasks**

Depending on the type of information and the scope of functions you require in your enterprise, you can modify the TMW to reflect the task-specific needs of your time administrators.

This is possible using profiles. Time administrators call the TMW using a profile that contains specifications for the scope of functions and the screen layout that will appear.



**Figure 141: TMW Screen Areas: Calendar and Employee List**

The *Calendar* is used in the TMW to select the period for which time data is to be entered. When the TMW is accessed, a period is automatically selected. You can define the length of this default period in the profile settings when customizing the TMW.

The *Employee List* displays the employees assigned to the time administrator in his or her profile. From the employee list, time administrators select the employees for whom they want to maintain or display data.

Depending on their profile settings, time administrators can be assigned several employee lists that they can toggle between.

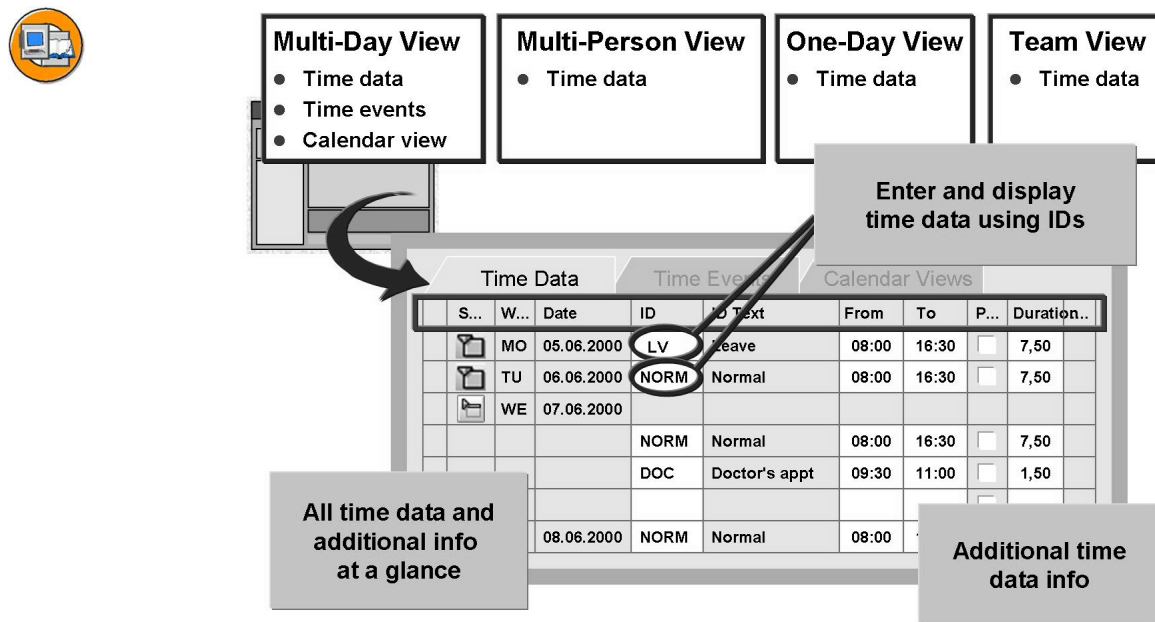
The profile determines whether or not, and according to which selection criteria, time administrators can create, change, or delete their own lists.

The profile used to access the TMW also determines how the employee list is displayed on the screen.

Additional information on your employees may be available (such as cost center, payroll area, work schedule rule, and so on).

The employee list can be displayed in a tree structure or without a hierarchy.

Time administrators can also temporarily add employees for whom they are not usually responsible to the employee list.



**Figure 142: Recording Time Data**

The *Time Data* area enables time administrators to maintain all time data for their employees without having to jump to different screens.

The following views are available for the Time Data area:

The *Multi-Day View* allows you to maintain several days of time data for one employee.

The *Multi-Person View* allows you to maintain one day's time data for several employees at one time.

The *One-Day View* allows you to maintain time data for one specific day for one employee.

The *Team View* allows you to maintain time data for several employees for a selected period.

Two tabs are included for the *Multi-Day View* in the standard system:

You can maintain time data stored in the *Time Events* infotype (2001) on the *Time Events* tab.

You can maintain all other types of time data for all of the remaining time management infotypes on the *Time Data* tab. The time data from the *Time Events* infotype (2011) is displayed in pairs on this tab, however, they are only used for display purposes.

The *Time Events* tab is not available in the One-Day View, Multi-Person View, or the Team View.





S...	W...	Date	ID	ID Text
	MO	06/05/2000	LV	Leave
	TU	06/06/2000	NORM	Normal
	WE	06/07/2000	NORM	Normal
			DOC	Doctor's appt
			EERI	EE remun. info

**The day dominant contains the most important info for a full day**

**Day dominants can be:**

- Full-day absences (Infotype 2001)
- Full-day attendances (Infotype 2002)
- Full-day planned specs (Infotype 2003)
- Planned working time (Infotype 0007)

Decreasing priority

**Figure 143: Recording Time Data: Day Dominants**

Time data is entered using intuitive time data IDs. This significantly reduces the administrative workload of time administrators. For example, you could enter "ILL" to create an illness record. The actual time data IDs that can be used for specific or general time data are defined in the Customizing steps for Personnel Time Management based on the business requirements of your enterprise.

Additional fields enable you to store additional information about the time data entered. The fields that are displayed are defined in the profile used.

The time data entered using time data IDs is actually stored in the following infotypes: Absences (2001), Attendances (2002), Substitutions (2003), Availability (2004), Attendance Quotas (2007), Employee Remuneration Info (2010), Time Events (2011), and Time Transfer Specifications (2012).

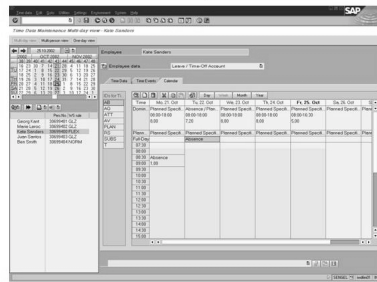
In the Time Data area of the TMW, day dominants are used to represent the most important information that applies to each day. The focus is on the employee's availability. Day dominants always represent information that applies to an entire day. They are available for use in the One-Day, Multi-Day, Multi-Person, and Team Views.

If you collapse the time data for a specific day, only the dominant information for that day is displayed. If you expand the day's data, all of the time data for the day in question is displayed. An additional blank line appears on the screen, in which you can enter more time data. In the team view, you can enter data only in the time data ID line of the dominant.

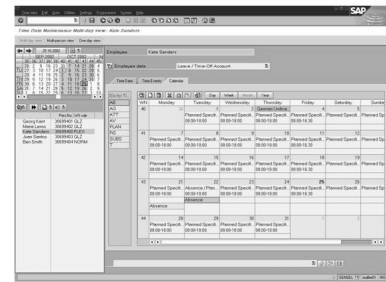




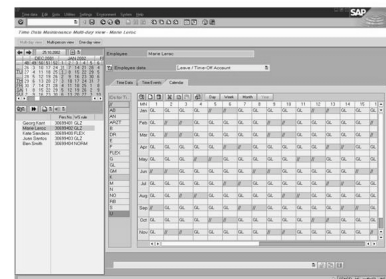
TMW weekly calendar



TMW monthly calendar



TMW annual calendar



- Three new calendar views have been added to the Time Data area of the Multi-Person View

New in Enterprise

Figure 144: TMW calendar views

The calendar view is new in the time data maintenance area of the TMW. It provides a graphical overview of a person's time data (time entries and time events). A daily, weekly, monthly, and annual calendar are available, which enables you to gain a quick overview of a specific period.

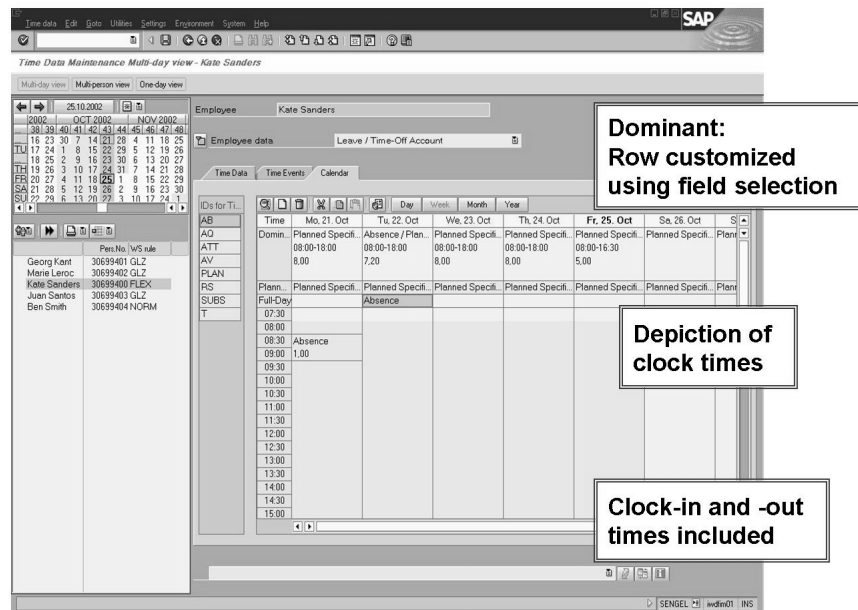
The use of colors for the time data IDs enables you to quickly differentiate different types of time data.

You can also maintain data in this view. The color-coded time data IDs are displayed in a bar to the left of the calendar. You can drag and drop them to the required days. If required, you can copy and paste the calendar entries, such as recurring attendances or absences.

Because they work in a similar way to well-known PC applications (such as Microsoft Outlook), the calendars are very easy to handle.

The new calendar views are part of the standard delivery for R/3 Enterprise. They can also be implemented in Release 4.6C on a project basis. (See SAP Note 421014)

If you are interested, you can create a SAP OSS message under the PT-RC-UI-TMW component.



**Figure 145: TMW Calendar Views: Weekly Calendar**

The weekly calendar represents a seven-day week. Users select the week they want to display or maintain in the calendar in the upper left screen area.

The weekly calendar displays the date in the top row. The row also displays public holidays, taken from the holiday calendar assigned to the employee. The day dominant is displayed in the row below. It is defined as it is represented on the Time Data tab page. Then, the full-day records of the *Attendances* or *Absences* infotype are displayed. (If there are none, the planned working time is displayed.) The time data with clock times is displayed below that. They are displayed alongside the appropriate time in the calendar. The recorded clock time and the duration can also be displayed.

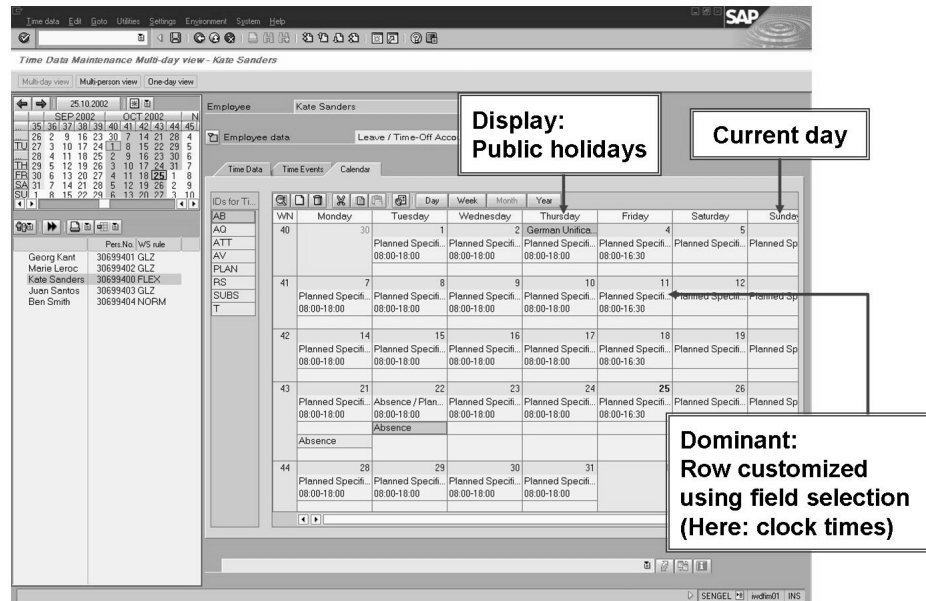
In this view, it is possible to display time data and time events at the same time.

To maintain time data, administrators can simply drag and drop the color-coded time data IDs from the list to the left of the calendar. To enter records of more than one day, you double-click on the detail area. You can also drag and drop time entries to change their position. If you want to maintain a time entry more than once, you can use the copy and paste function. You can also use the *Delete* button to remove incorrect time entries.

You can customize the appearance of the calendar views to suit your requirements.

In addition, each user can maintain his or her own personal settings. For example, users can define their own color scheme for each of the four views. The *Settings* button is to the left of the *Day* button.

The TMW calendar views also include the daily calendar. It contains the same functions as the weekly calendar, but focuses on one day to aid readability.

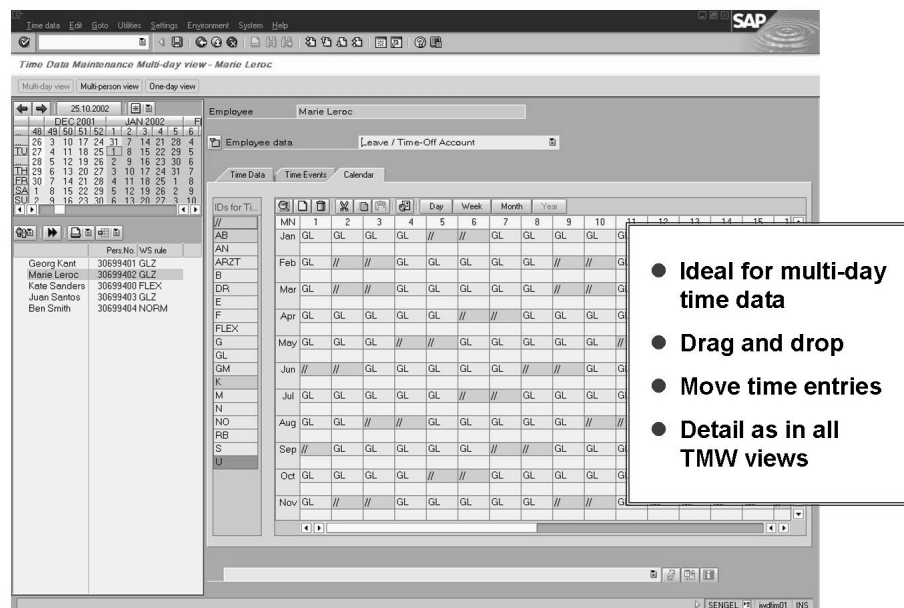


**Figure 146: TMW Calendar Views: Monthly Calendar**

The monthly calendar provides an overview of an entire working month. As for the weekly calendar, you can select the period in the calendar to the upper left.

The calendar displays the weekdays horizontally and the calendar weeks vertically. The date is displayed in the box for the day. The current day is highlighted in bold. Public holidays are displayed here in place of the current date.

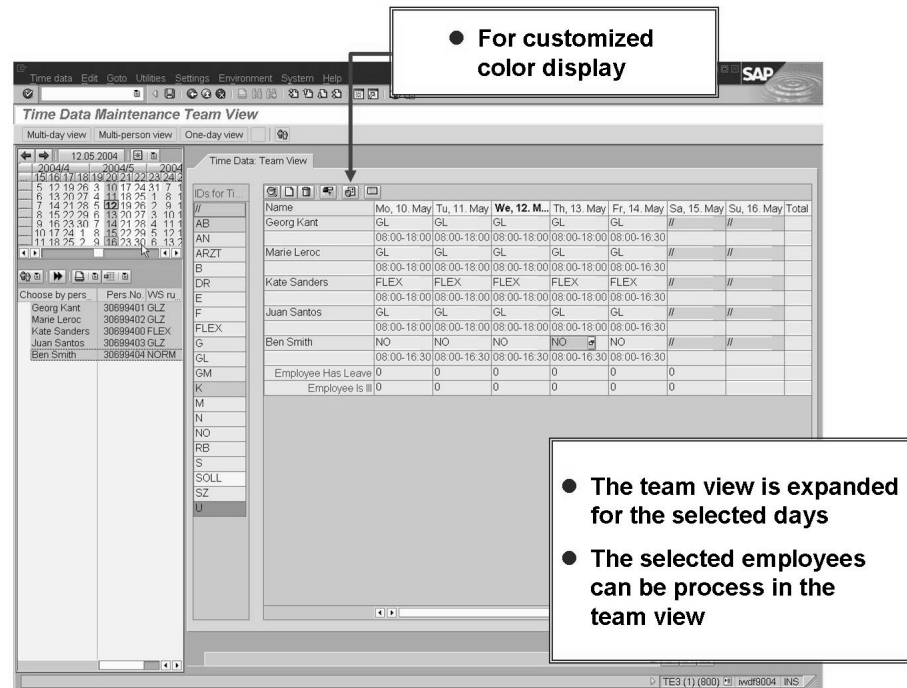
To prevent the display from becoming too cluttered, you can customize it so that the partial-day records are displayed collapsed. To view further information for the day, you can select it by clicking on it and then switch to the weekly view or the day view.



**Figure 147: TMW Calendar Views: Annual Calendar**

The annual calendar provides the broadest overview of your employee's working times. You can view time data for an entire year at a glance.

You can check the shift pattern of the assigned work schedule and the vacation planning, and also maintain data such as a change in leave or an illness over a longer period of time, for example. You can use the drag and drop and copy and paste functions in this view too. You can double-click to view details for time data.



**Figure 148: TMW Team View**

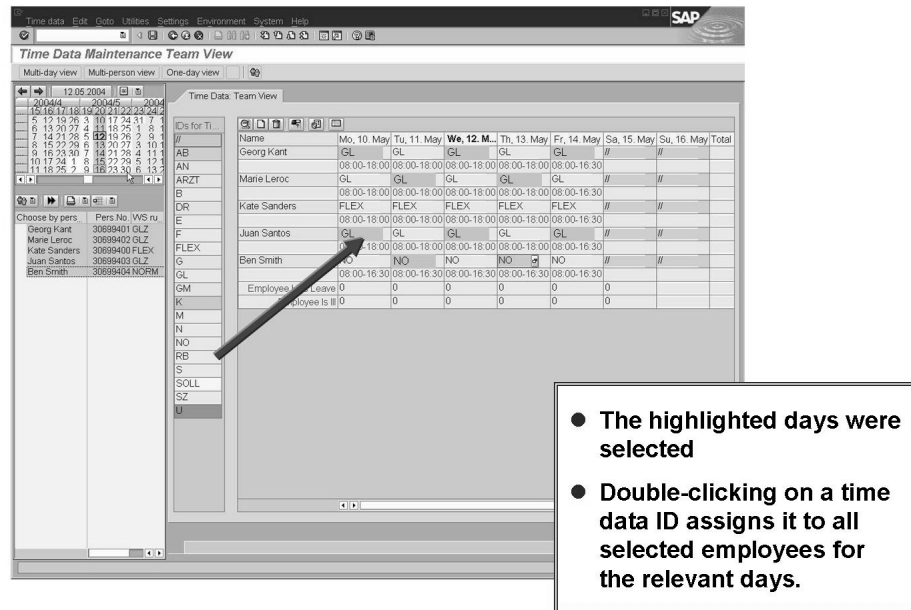
The team view is a list-oriented color display of a group of employees' time data over a period of your choice. It provides an overview of the position and frequency of full-day and partial-day data for your entire team. The team view is ideal for entering time data when you want a quick overview of full-day time data for your entire team.

If partial-day information is available for employees, you can display it by double-clicking the tick icon beside the dominant. This then takes you to the on-day view for the employee, where you can select the entry and branch to the detail view. To return to the team view, you simply double-click the *Team View* option.

You select in the calendar the period you want to edit. You can select the employees from the employee lists. You can also add employees to the team temporarily.

If you want to plan shifts and vacation for your team, the different colors of the time data IDs enable you to recognize at a glance the position and frequency of the different shifts, and detect any bottlenecks.

The team view provides a quick overview of full-day and multiple-day time data for your entire team. To simplify the planning process, you can use a customer-specific Business Add-In (BAI) to define additional rows and columns for the information you require, such as the number of employees off sick or a shift counter displaying the number of early, late, or night shifts, for example.



**Figure 149: TMW Team View: Maintaining Time Data**

The list-oriented team view contains many familiar functions from PC applications, which enable you to process time data quickly and easily. You can enter time data for individual employees or an entire team.

You can customize particular colors for the time data IDs that are permitted in a profile for the Time Manager's Workplace. You can also have IDs representing similar business situations displayed in the same color or a similar color so that time administrators can analyze an employee's time data at a glance.

In addition to the color aid, the ID itself is also displayed in the field to indicate the exact nature of a time entry. The color IDs are listed in a key in a column next to the calendar view.

In the team view, you can enter data only in the time data ID line of the dominant. You can enter whole-day time data in the following ways:

- You can drag and drop time data IDs from the column to a field of the calendar. To do so, select the ID in the list, click on it again and, while holding down the mouse button, drag it to the required position in the team view. Alternatively, you can select the required field(s) in the team view and double-click a time data ID, or you can simply enter the required time data by overwriting the existing time data ID.
- As in the other list-oriented views, you can use all functions for copying, creating, and deleting time data and so on.



**Caution:** Cutting and pasting in the team view is possible only for the dominant.



The screenshot displays the 'Time Data for Team View' window. It features a table with columns for days of the week (Mo, 8. Aug to Su, 14. A.) and a 'total planned' column. The table lists team members: Georg Kant, AN, ARZT, B, DR, E, F, and FLEX. A callout box with a black arrow points to a tick icon in the 'Tu, 9. Aug' column, stating: '● Double-clicking on the tick beside the dominant takes you to the one-day view'.

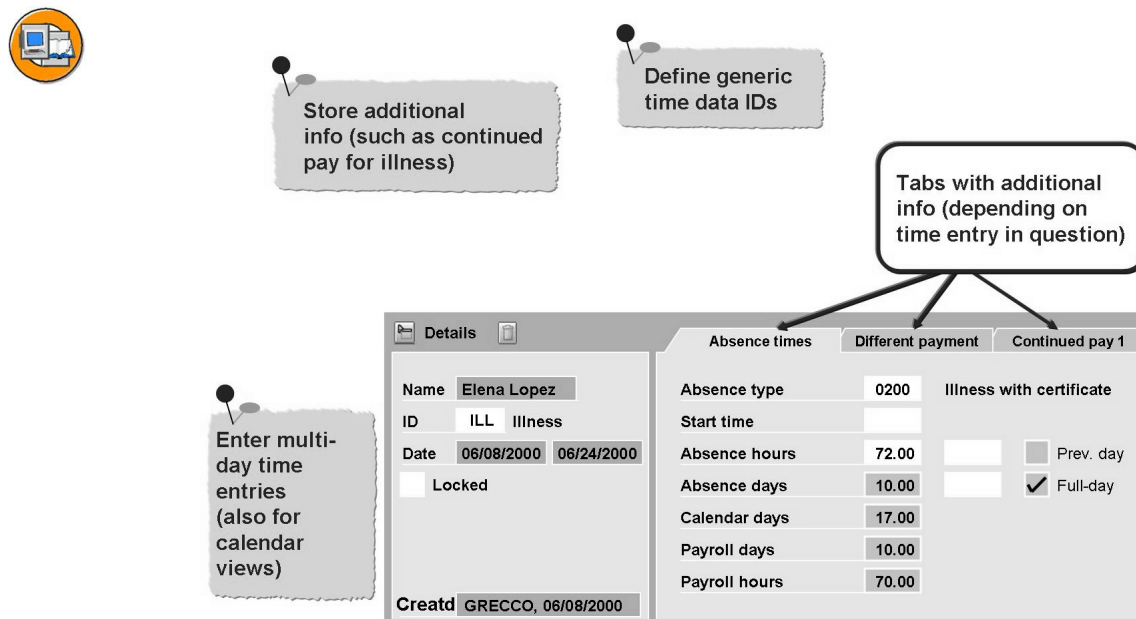
Below the team view, a 'Time Data' window is shown, displaying a table with columns: S., Name, ID, ID text, Start, End, P., Duration/Amount, Cost center, and O. The table lists data for Georg Kant, including a 'Flextime' entry with a duration of 8.00.

**Figure 150: Processing Partial-Day Entries in the Team View**

o enter partial-day information, double-click on the dominant (the field to the right of the time data ID) of the required day. The one-day view is automatically expanded. In it, you enter information such as a doctor's appointment to specify the time entry. You can branch from the one-day view to the detail view to enter additional data.

If partial-day time data exists for a day, a tick icon is displayed in the field beside the dominant. You can click on the tick to branch to the one-day view displaying the partial-day time data, where you can edit the data. To return to the team view, double-click on *Team View* in the menu.





**Figure 151: Details**

The *Details* screen area can be used for the following functions:

If the columns displayed in the *Time Data* screen area are not sufficient, you can display the *Details* area to further specify the time data.

You can define the specific type of time data where a generic time data ID has been used (see below).

The *Details* screen area can be used to enter multi-day time entries.

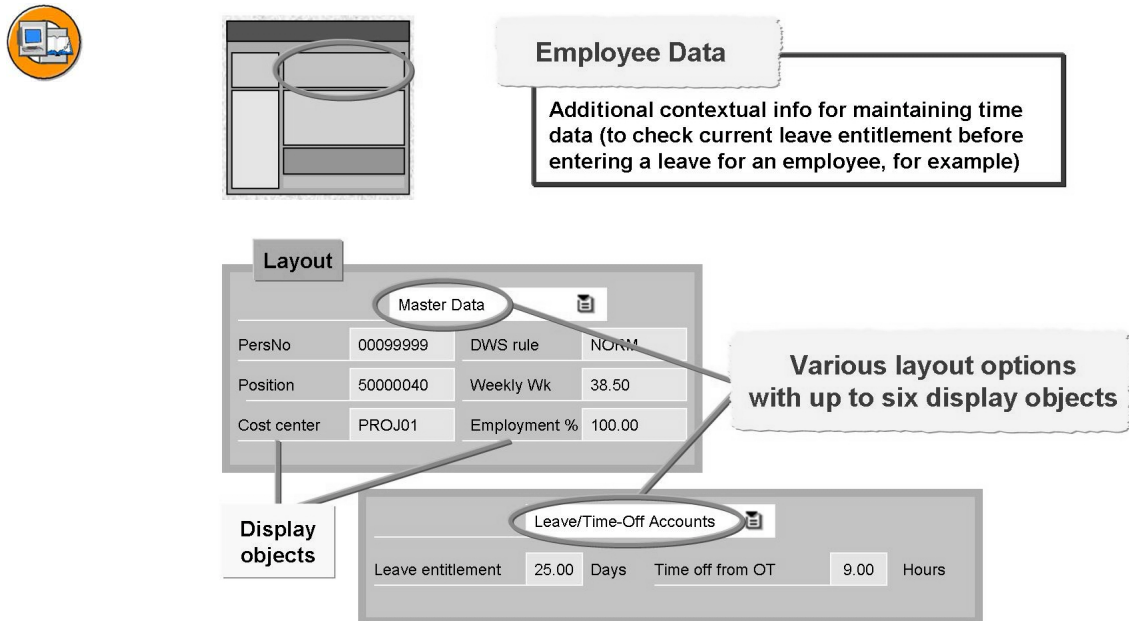
If the *Details* area is displayed for an existing time entry, the appropriate screen will appear that is used for that type of time data. In other words, the appropriate tab cards and fields will appear.

### Generic time data IDs:

You should only define these types of time data IDs for data that is regularly used by time administrators. Time administrators can also use these generic time data IDs for other types of time data and then use the *Details* area to further specify the data.

**Example:** There are two different time data IDs used for the most common types of attendances in your enterprise. A generic time data ID is used for all other attendances. When one of these more seldom used attendance types must be used, time administrators simply enter a generic time data ID and then further specify the type of attendance in the *Details* area.





**Figure 152: Employee Data Screen Area**

The *Employee Data* screen area displays additional contextual information about the selected employee, which time administrators can use to assist them when entering data (HR master data or time account balances, for example).

It is useful for time administrators to be able to view their employees' time account balances when recording leave or time off from overtime, so that they know whether enough quota remains to record this data.

Display objects (that is, individual information) that are displayed together can be grouped in a layout (called an InfoGroup).



## Lesson Summary

You should now be able to:

- Explain the functions of the Time Manager's Workplace

## Lesson: Customizing the Time Manager's Workplace

### Lesson Overview

In this lesson, you learn how to customize the Time Manager's Workplace.



### Lesson Objectives

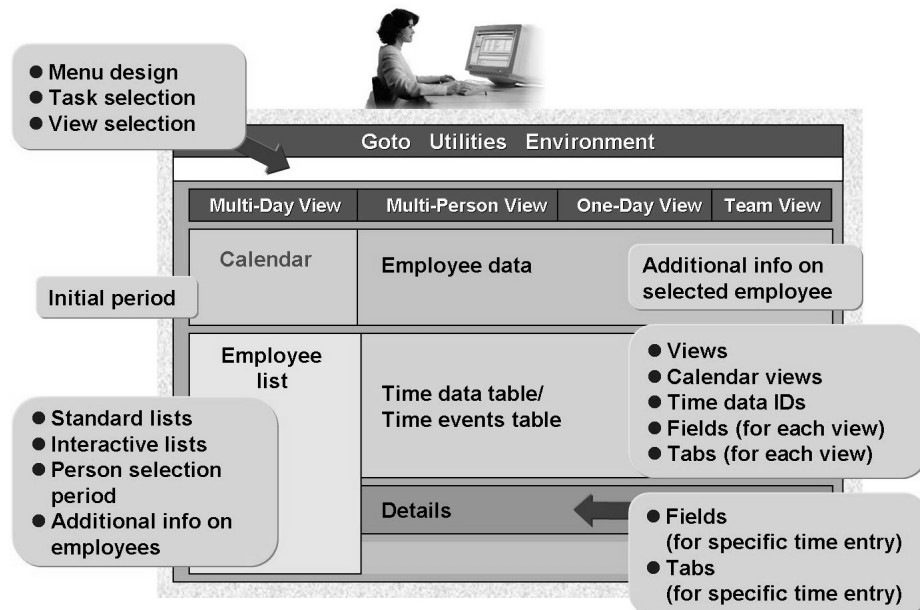
After completing this lesson, you will be able to:

- Customize the TMW to include the tasks and functions of the time administrators in your enterprise

### Business Example

Your job is to configure the TMW so that time administrators have access to the specific functions they need to complete their time recording tasks.

### Overview



**Figure 153: Customizing the Time Manager's Workplace**

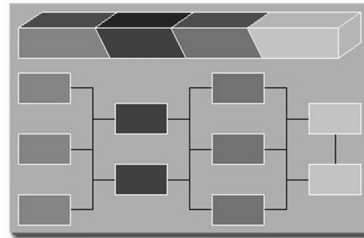
The screen layout and scope of functions in the TMW can be flexibly and individually modified to suit the specific tasks of your time administrators.



## Help in implementing the TMW

### Consulting note for the TMW: 447097

- Is continuously updated
- Contains further notes that may be relevant for implementation
- Is updated for SAP R/3 Enterprise release



**Figure 154: Consulting Note for Implementation**

To provide you with the most up-to-date information, SAP development continuously updates the consulting note 447097: “Questions and answers on the TMW implementation.”

This note also contains information for the SAP R/3 Enterprise release (SAP\_HR 470) in the relevant HR Extension release (such as EA-HR 110).

You can also display the note on the Internet. You will find a link to SAP Notes under <http://service.sap.com>. You can request a user for the service portal free of charge.

The following notes are related:

0000407303 Employee dialog box in the Time Manager's Workplace

0000421014 TMW calendar views - availability on 4.6C

0000415425 Transport of Customizing Settings

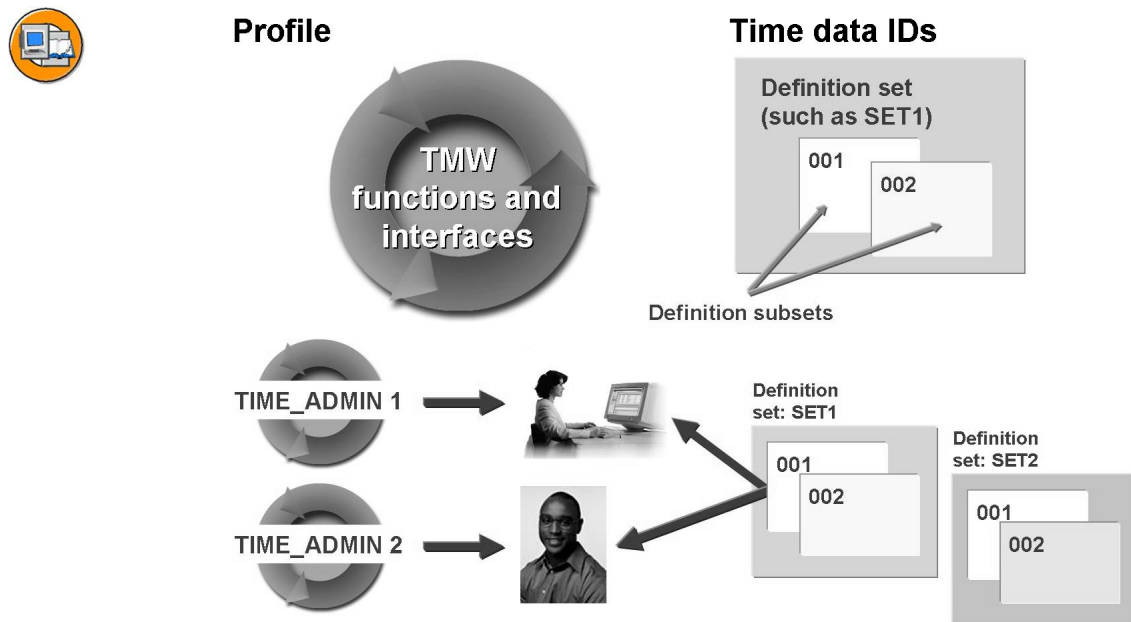
0000415119 Required entry fields in detail area of TMW

0000367249 Customer enhancements for the BLP

0000455468 TMW: Message line in the upper screen area

0000598986 TMW: Team View

(The notes are available in English and German.)



**Figure 155: TMW: Profiles and Time Data IDs**

Profile methodology allows you to modify the appearance and certain functions of the *Time Manager's Workplace*. Users always access the TMW using a profile, which defines the following:

The initial date that appears when the TMW is accessed

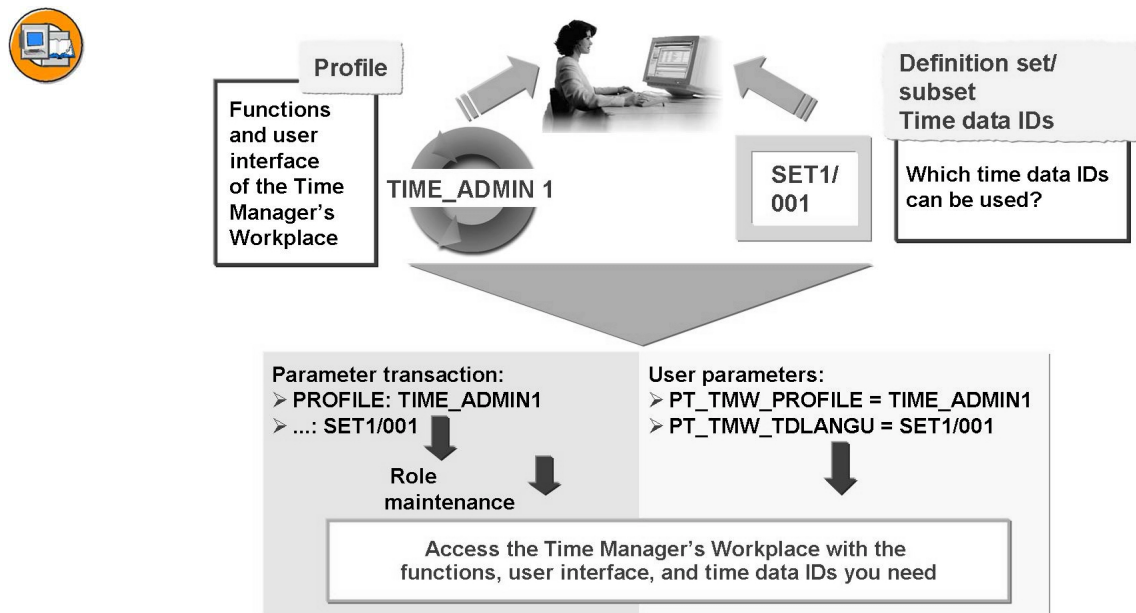
The employee lists available to the time administrator

The fields, columns, layouts, views, and functions in the individual screen areas of the TMW

Whether users can switch between various time data ID subsets

Time data IDs can be individually defined for the types of time data in the TMW. If you want to use different time data IDs in different enterprise areas, then you can create several definition sets, which can, in turn, be subdivided into different subsets.

A profile and a combination of definition set/subset must be assigned to each time administrator.



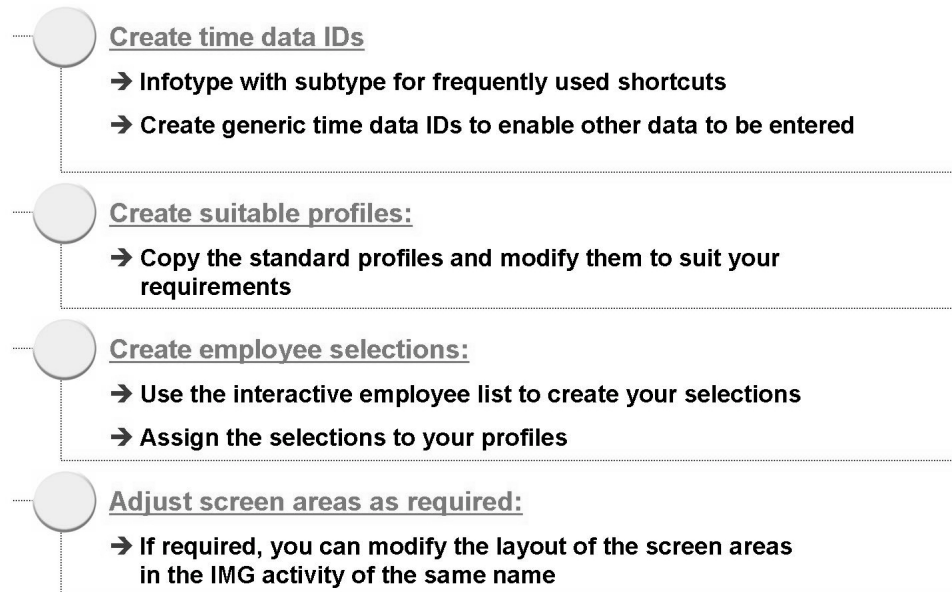
**Figure 156: Customizing the TMW for Time Administrators' Tasks**

The following options are available to ensure that your time administrators always see the right screen with their required functions and time data IDs automatically when they access the TMW:

Parameter transactions are created in which a profile and a combination of a definition set and subset for time data IDs are stored. These parameter transactions can also be used in role maintenance. If a role is assigned to the time administrator, the profile that is used to access the TMW and which time data IDs the time administrator can use depend on the parameter transactions assigned to that role.

You can use the user parameter **PT\_TMW\_PROFILE** to specify for each user the profile used to access the TMW; the user parameter **PT\_TMW\_TDLANGU** determines the combination of definition set/subset the user can use.

If values for the profile and the definition set/subset are not specified either in the assigned role or in the user parameters for the user, then the system queries this information when the user accesses the TMW. The user must then enter the appropriate values. The system stores these values in the user parameters and uses them from then on each time the TMW is accessed by that user.



**Figure 157: Customizing Recommendations**

When a time administrator calls the TMW for the first time, the system automatically queries which profile and which combination of definition set/subset for time data IDs are to be used by the application. These specifications are mandatory. Therefore, you must create the profiles and time data IDs that you require in your enterprise. Determine which tasks your time administrators have to carry out.

It is recommended that you copy the profiles and, if required, time data IDs provided in the standard system.

You should enter generic time data IDs for each infotype or personal work schedule for the types of time data for which you do not want to create your own time data IDs.

If you want time administrators to have the employees for whom they are responsible displayed automatically in the TMW, you have to create suitable employee selections. You store these employee selections in each profile.

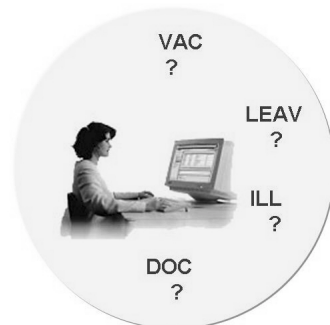
If necessary, you can modify individual screen areas of the TMW to match the requirements of your time administrators. If you do not store your own field selections in the profiles for each screen area, then the field selections displayed are those contained in the standard system.



Which type of time data is defined by an ID?

Time data			Time events	Calendar
S...	W...	Date	ID	ID Text
	MO	06/05/2000	EA	.....
	TU	06/06/2000	LA	.....
	WE	06/07/2000		

Two question marks are placed below the table, with lines pointing to the 'EA' and 'LA' IDs in the 'ID' column.



Which time data IDs are to be permitted for the time administrator?

Figure 158: Customizing Time Data IDs (1)

Time administrators require time data IDs to record time data.

You can define the exact type of time data that the time data ID stands for.

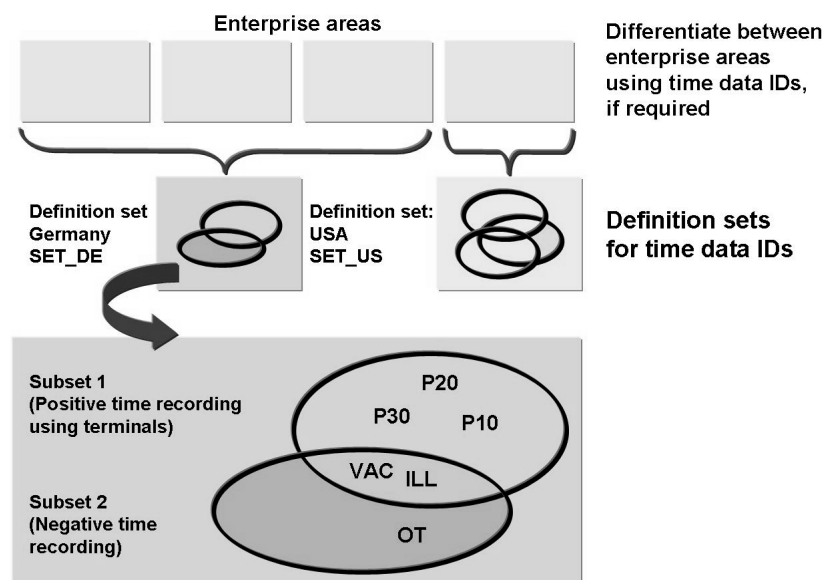


Figure 159: Customizing Time Data IDs (2)

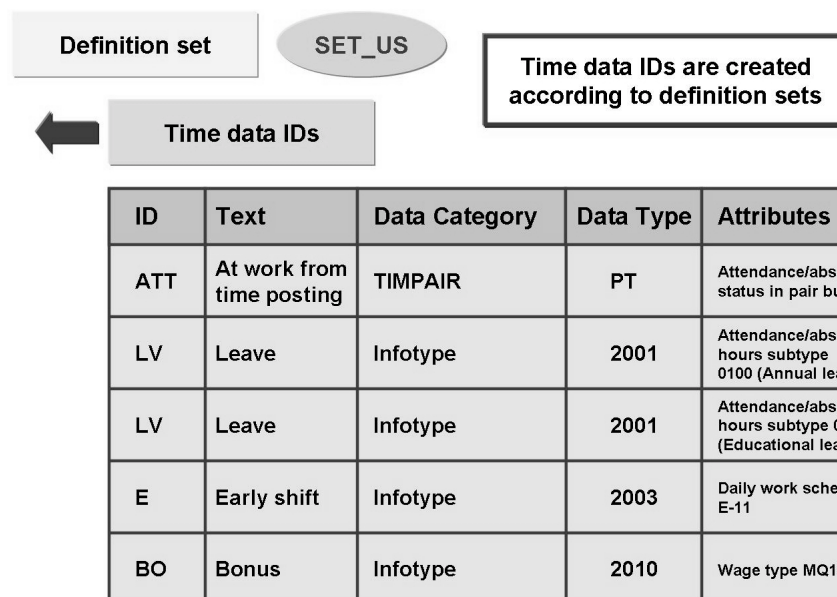


Time data IDs do not need to be defined the same across your enterprise. If enterprise areas want to use different time data IDs, you can create definition sets for the individual areas. Then time data IDs can be defined for these definition sets. Definition sets allow the time data IDs to be used independently in different areas of your enterprise.

#### Example:

An international company uses the time data ID "VAC" for vacation, "OT" for overtime, "AV" for availability, and so on. The German subsidiary, however, uses the time data IDs "U" for vacation, "M" for overtime, and "B" for availability. In this case, two definition sets are created.

Within a definition set, you can also define different subsets for time data IDs to differentiate between the time data IDs within one enterprise.



**Figure 160: Customizing Time Data IDs (3)**

Each time data ID must be assigned to one of the following data categories: infotype (IT), time pair (TIMPAIR), or work schedule rule (PWS).

In addition to the data category, a data type must be entered, and additional information that uniquely identifies the type of time data.

The following are examples of data types that are available for the data category **Infotype (IT)**:

*Absences (2001), Attendances (2002), Substitutions (2003), Availability (2004), Attendance Quotas (2007), Employee Remuneration Info (2010), Time Events (2011), and Time Transfer Specifications (2012).*

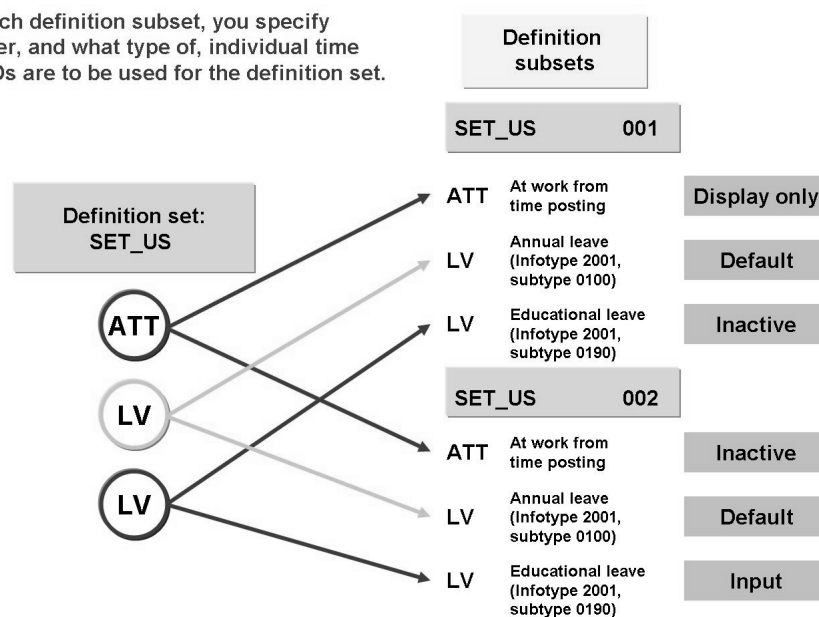
The data category **Time Pair (TIMPAIR)** can only be used in combination with the data type *Time Pair*.

The data category **Work Schedule Data (PWS)** can only be used in combination with the data type *Inactive*. The system uses this type of time data ID to display employees who are not active employees, that is, they have left the company during this selection period.

You can create generic time data IDs. The data type attributes are not required for these types of time data IDs. Generic time data IDs are used for time data that is infrequently entered or processed by time administrators.



For each definition subset, you specify whether, and what type of, individual time data IDs are to be used for the definition set.



**Figure 161: Customizing Time Data IDs (4)**

By creating subsets, you can further differentiate how the time data IDs are used within one definition set.

Time data IDs are created for each definition set. Definition subsets specify the following:

Which time data IDs can be entered (specific ID has priority or can be changed).

Which time data IDs are used for display purposes only ("display only")

Which time data IDs are not to be used for this subset ("Inactive")

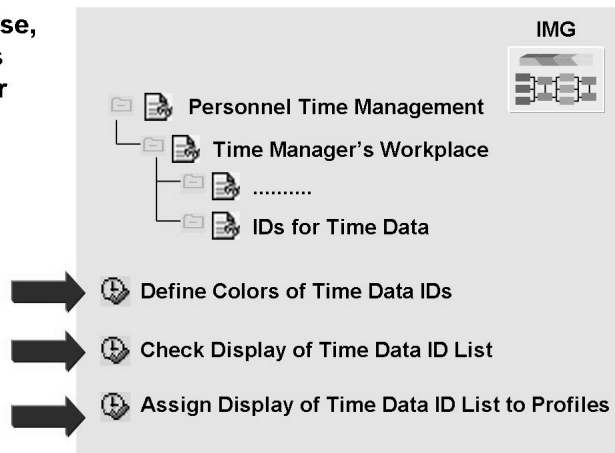
If employees are to enter time data IDs, you must define them as the default or an input ID:

You must specify any time data ID that reflects only one characteristic as the "default."

If several characteristics exist for one time data ID (such might be the case for "LV" for annual leave (infotype 2001, subtype 0100) and Educational Leave (infotype 2001, subtype 0190), then you must indicate that one of these characteristics is to be the default (for each combination of groupings for personnel subarea and employee subgroup).



- **In SAP R/3 Enterprise, there are new steps for time data IDs for the calendar views and team view::**



**Figure 162: Customizing Time Data IDs for Calendar and Team Views**

In R/3 Enterprise, there are new steps for time data IDs for the calendar views and team view.

The color-coded time data IDs are displayed in a bar to the left of the calendar. You can drag and drop them to the required days. If required, you can copy and paste the calendar entries, such as recurring attendances or absences.

There are new Customizing activities to enable you to define the colors and the appearance of the time data ID list.

In the first new activity, you create the color design for the calendar views and the team view. You can define different colors for the different time data IDs. This gives users a better overview of the relevance or frequency of time data, for example.

In the second activity, you define the layout of the time data ID list to the left of the calendar. Users can drag and drop time data IDs from the list to the calendar. The settings apply to all calendar views and time data IDs and for the team view. You can choose between the following options:

You can have the time data IDs themselves displayed for experienced users (the HIDE field selection)

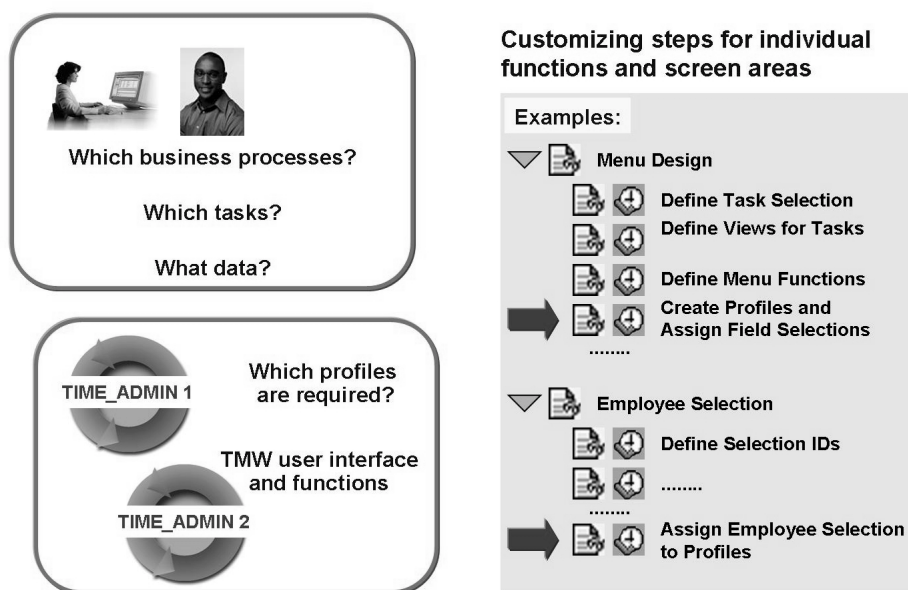
You can have the texts of the time data IDs displayed for less experienced users (the TEXT field selection)

You can hide the list entirely so that users can only use the detail screen to enter new time data (the TDTYPE field selection)

In the third new activity, you assign the layout of the time data ID list to the profiles.

You therefore use the profile used to access the Time Manager's Workplace to control the layout available to the time administrator for the time data ID list.

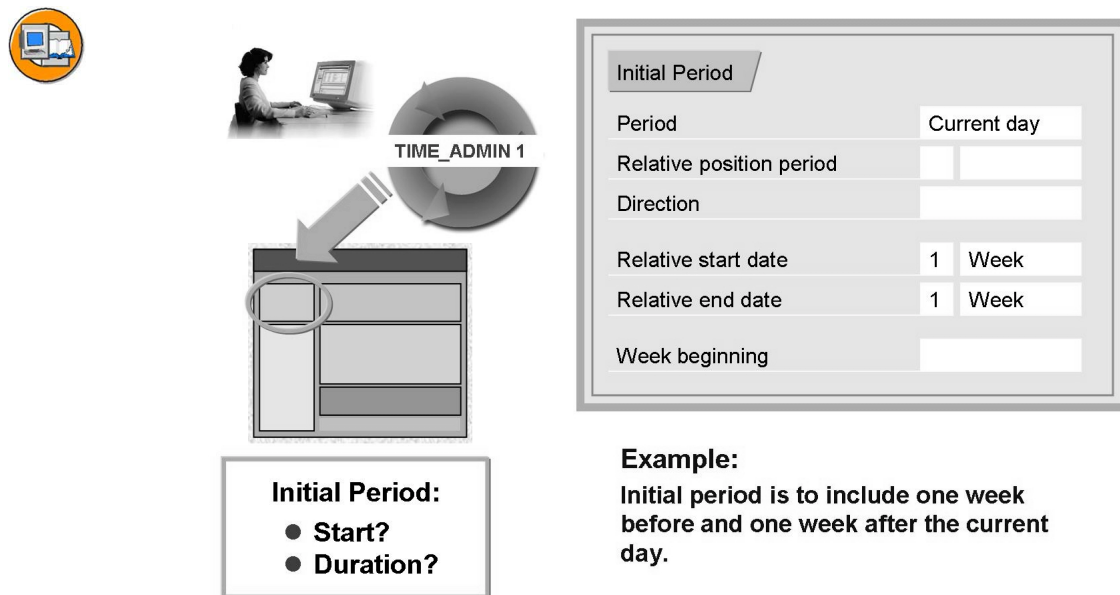
The time data ID list is part of the TDT screen area.



**Figure 163: Profiles**

SAP delivers three sample profiles in the standard system: SAP\_XX\_TIME\_ADMIN (Time Data Maintenance), SAP\_XX\_TIME\_AD\_GRP (Time Data Maintenance for Groups) and SAP\_XX\_WORKLIST (Message Processing). You can use these profiles to maintain time data, or copy them and modify them to make your own company-specific profiles.

You can also maintain profiles in the Implementation Guide as soon as you have completed a logical unit in Customizing and you want to transfer the selections and definitions to the profiles.



**Figure 164: Customizing: Initial Period**

The initial period to be used every time the TMW is accessed is stored in profiles.


In the first step, you determine the initial date as the current day, week, or month. If the week is selected as the initial period, then you can specify which you want to be the first day of the week.

You can then move the position of the initial period forward or back by a specified duration (which you can enter in days, weeks, or months).

You can also change the duration of the initial period. You can extend the initial period by entering a duration that has a start date in the past, or an end date in the future.

**Note:**

If you want to extend the initial period by weeks or months, note the following: If, for example, you enter a week, then the system increases the initial period up to the first day of the week or the weekend. If the initial date is the first day of the week or weekend, then the system extends the initial period another week into the past or future. In other words, the initial period can be extended by up to one week in each direction. The same applies if you enter one month.



Which groups of selection IDs are to be valid for this profile?

Which group of selection IDs is to be valid for interactive selection?

Standard selection using selection criteria		
User-specific selections according to group	SELBEN01	
Multiple-user selections according to group	SELSACHB	
Interactive selection		
Selection criteria according to group	SEL_INTERACT	
Person selection period relative to initial period		
Relative start date	1	Period
Relative end date	3	Periods

Which person selection period is to be valid?

**Figure 165: Profile Settings for Employee Selection**

In the profile, you specify which employee selections are valid when the TMW is accessed using this profile.

In a **standard selection**, you can specify for employee selection either a user-dependent group or a group available for all users.

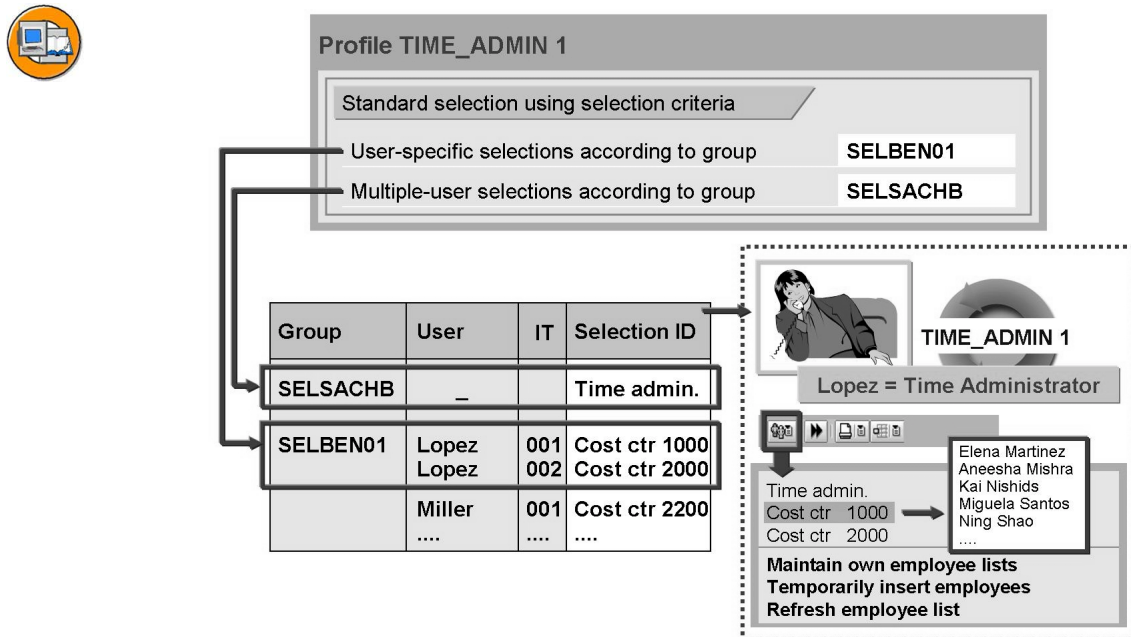
If you want your time administrators to be able to create their own employee selections, then you must set up a corresponding group for **interactive selection**.

The entries for the **person selection period** are required for two reasons:

Whether or not, and up to what point of time in the past, the system will display employees who are no longer assigned to the time administrator or who have left the company

Whether or not, and up to what point in time in the future, the system displays employees who are to be hired at a future date or will be assigned to that time administrator in the future

The person selection period is calculated on the basis of the respective initial period. If you do not specify the **Person selection period relative to initial period**, the system selects the employee list for the period that you defined as the initial period. The entries for the **person selection period relative to initial period** cause the person selection period to be extended from the start date of the initial period backwards into the past, or from the end date of the initial period to a future date.

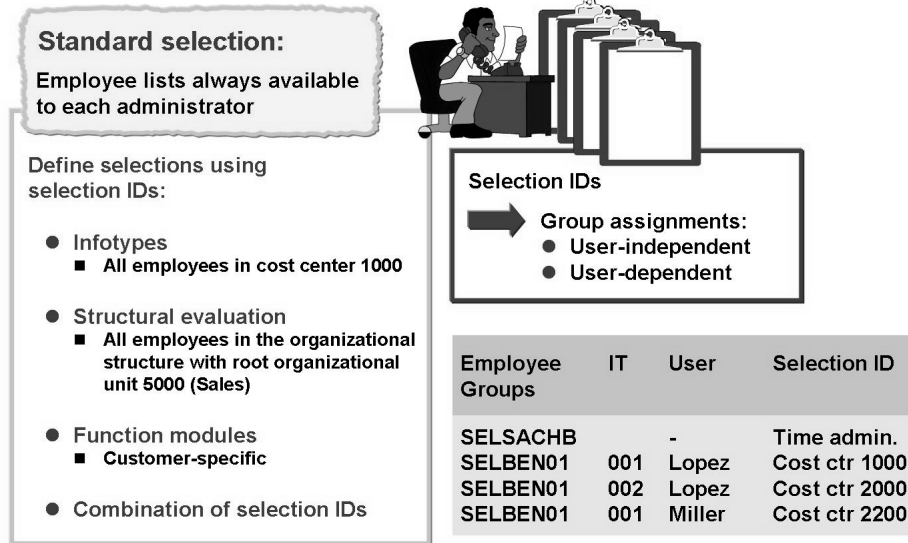


**Figure 166: Customizing: Employee Lists - Standard Selection (1)**

The standard selection is used to determine the employee selections available to time administrators in the Employee List screen area. The individual employee selections are defined using **selection IDs**.

In the standard selection, several employee lists (selection IDs) can be available to the time administrators. You do this by grouping the selection IDs.

In one of these groups, you can indicate that an individual selection ID is user-specific or available to all users. User-specific selection IDs are only valid for the user entered; user-independent selection IDs are valid for all users.



**Figure 167: Customizing: Employee Lists - Standard Selection (2)**

Selection IDs are also used in various areas of SAP HR to simplify the grouping together of objects for selection purposes. Selection IDs can be defined based on infotype tables, structure reports, or special function modules. These three types of selection IDs can be combined any way you require.

To define a **selection ID based on a table**, you can use the following types of fields: infotype fields, additional fields, text fields, or fields specific to SAP Query (additional fields, additional table fields, and alias table fields). You can also define ranges that restrict the amount of objects to be processed for selection IDs based on tables.

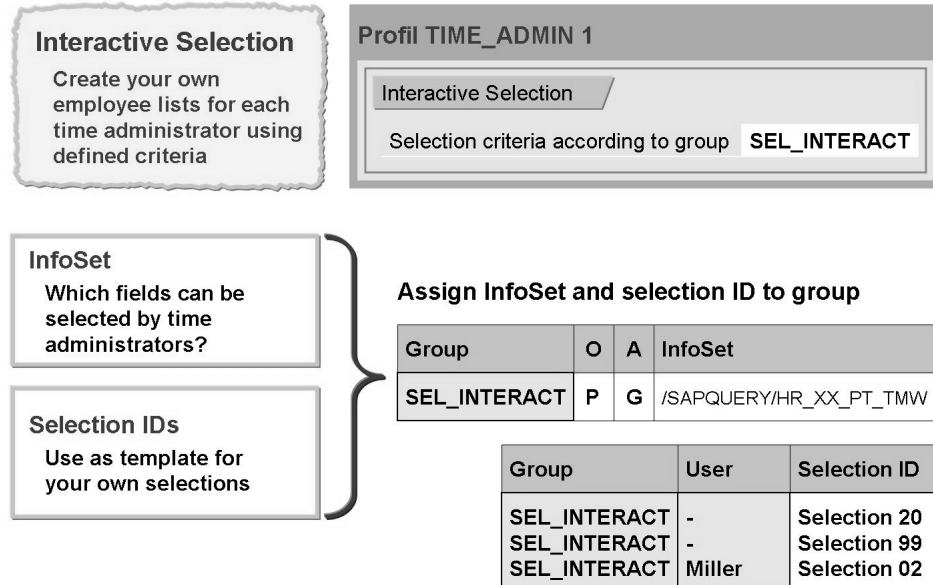
**Selection IDs based on a structure** correspond to a structural evaluation, that is, a start object and an evaluation path are used determine personnel numbers.

**Selection IDs based on a function** use a function module to collect data.

**Note:**

The selection based on the time administrator's ID is already included in the standard system.





**Figure 168: Customizing: Employee Lists - Interactive Selection**

Using the interactive employee selection function, time administrators can create their own employee lists according to specified criteria.

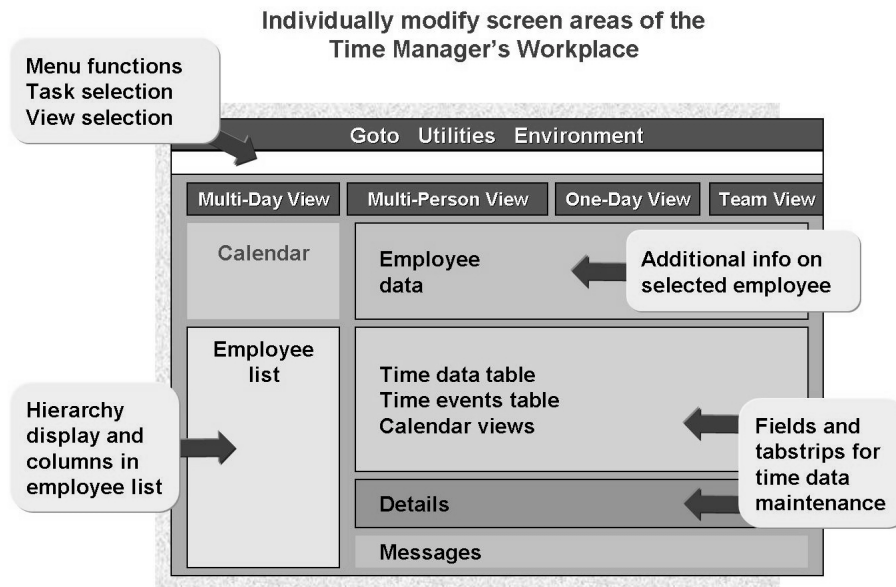
To be able to do so, they must have a group for interactive in their profile that they use to access the TMW.

An infoSet and optional selection IDs can be stored in a group for interactive selection. Time administrators can create their own employee selection using the criteria of the infoSet and any specified selection IDs (templates).

An infoSet provides time administrators with additional selection criteria (fields) to create their own employee selection.

If time administrators want additional employee lists (selection IDs) as templates for their own selections, then the corresponding selection IDs must be stored in the group for interactive selection.

The standard system contains the group TMW\_INTERACTIVE with the infoSet /SAPQUERY/HR\_XX\_PT\_TMW.



**Figure 169: Modifying Screen Areas**

The following **screen areas** can be customized using field selections:

Menu Design: Field selections for tasks, views, and menu functions

Employee List: Field selections for the columns to be displayed

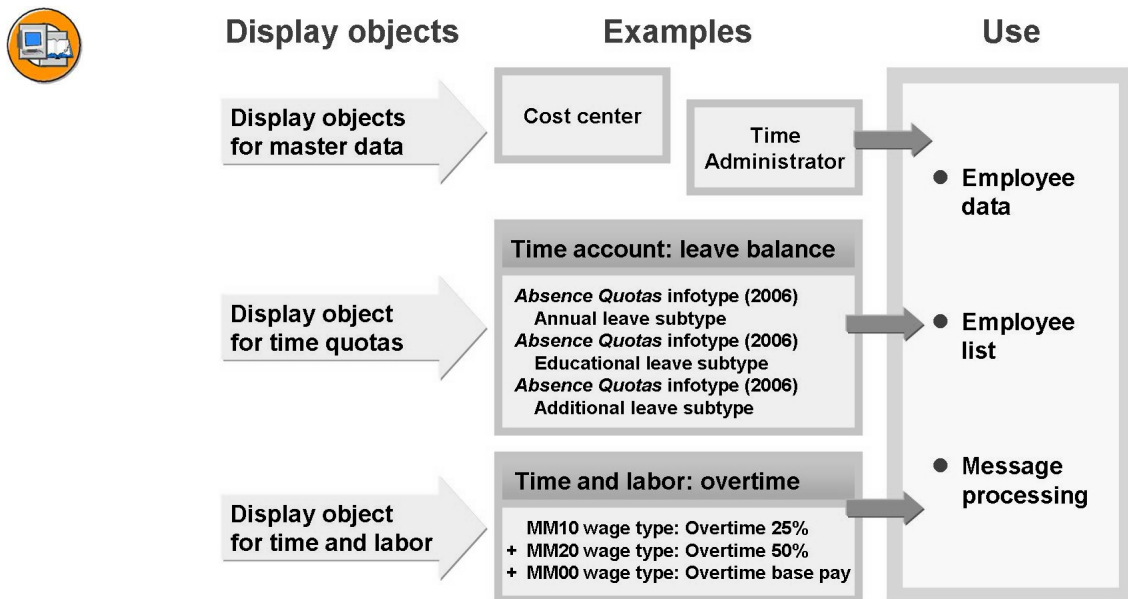
Employee Data: Layout selections for the employee data to be displayed

Time Data/Time Events Tables/Calendar Views/Team View: Field selections for the fields/tabs to be displayed

Detail View: Field selections for the fields/tabs to be displayed

Message Processing: Show contextual information using display objects

The field selections are stored in the profiles used to access the TMW. The field selections displayed in the screen areas of the TMW are therefore dependent on the profile used by time administrators to access the application.



**Figure 170: Basics: Using Information from Master Data and Time Data**

To allow time administrators to view additional information about their employees regarding time accounts, time and labor data, and HR master data in the TMW, you must first define this information as **display objects**.

Display objects can be used in the layouts for Employee Data, for the columns in the Employee List, and for message processing. You can define display objects for HR master data, time accounts, and time and labor data. The standard system contains standard display objects; you can define additional display objects if required.

In a display object for **HR Master Data**, you specify the field whose values you want to display, in relation to an infotype and, if required, subtype.

To display time account balances, you must first define **quota types for reporting**. A quota type for reporting provides a consolidated view of quota data (attendance and absence quotas and monthly totals), in which you can group several quota types in one quota type for reporting. You then define the quota types for reporting as display objects.

To be able to display time and labor data, you must first define **time types for reporting**. In a time type for reporting, you can group employee time and labor data (such as attendances and absences, time types, and wage types). You then define the time type for reporting as a display object.

Time types and quota types for reporting are used for simulated infotypes and to transfer time and labor data to the SAP Business Information Warehouse (SAP BW).



**Step 1:**  
Define field selections for  
individual screen areas

Menu functions (MEN)

Field selection 1

Field selection 2

Employee list (EMP)

Field selection 1

Field selection 2

Field selection 3

One-Day View  
Time Data (TN1)

Field selection 1

Field selection 2

....

**Step 2:**  
Assign field selections for  
screen areas to each profile

Screen Area

MEN

EMP

TN1

....

TIME\_ADMIN 1

TIME\_ADMIN 2

Field selection 1

Field selection 2

Field selection 2

....

Field selection 2

Field selection 3

Field selection 2

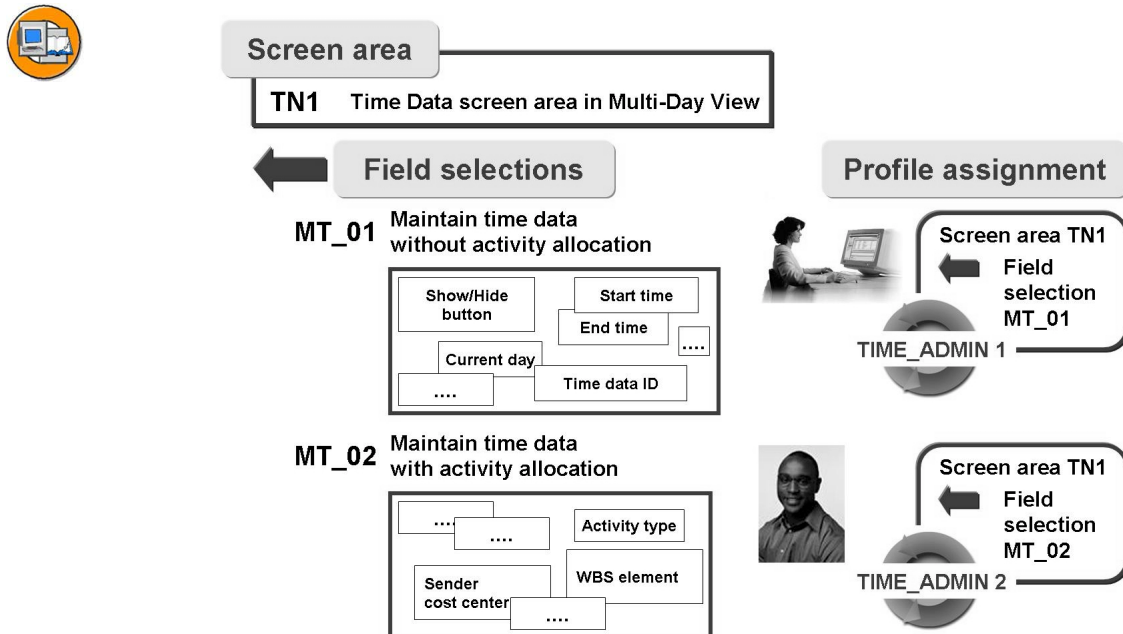
....

**Figure 171: Field Selections**

You create field selections in the same way for each screen area: From a set of objects (display objects, fields, and layouts), you group together the required subsets and define them as selections.

In the next step, you assign the selections for each screen area to the profiles.

In this way, you ensure that time administrators who access the TMW using a specific profile see the correct functions and fields they need to complete their tasks.



**Figure 172: Field Selections in Multi-Day View**

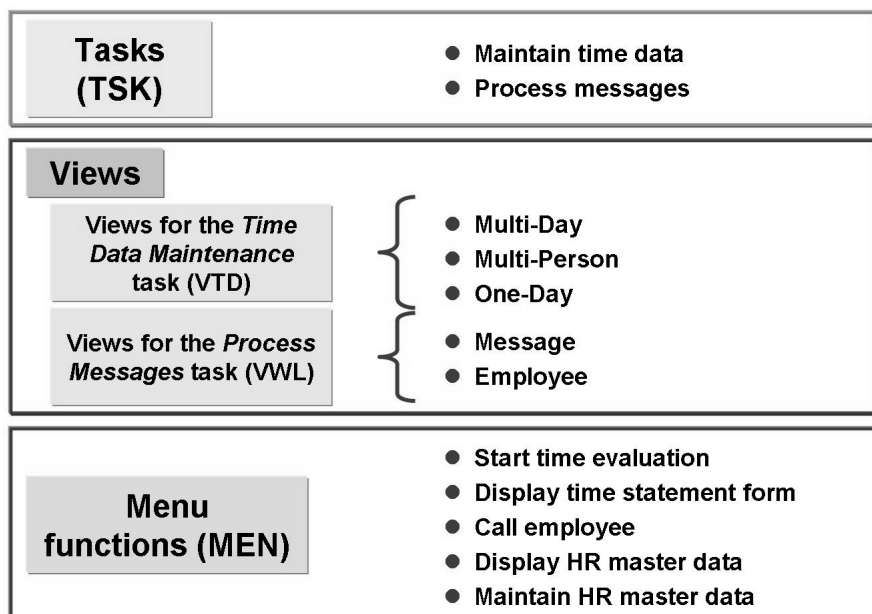
**Example** (for field selections for the *Multi-Day View* in the *Time Data* area):

The secretary Jane Martinez only maintains leave and illness days for employees; foreman David Grecco must also maintain activity allocation specifications, in addition to leave and illness.

You create two field selections, MT\_01 and MT\_02, whereby field selection MT\_02 also contains the fields required for maintaining activity allocation data.

Jane Martinez and David Grecco access the TMW using different profiles.

Jane Martinez's profile contains the field selection MT\_01 (for the Time Data area in the Multi-Day View); David Grecco's profile contains the field selection MT\_02. In this way, both will see the fields they need in the Time Data area in the Multi-Day View.



**Figure 173: Field Selections for Tasks, Views, and Menu Functions**

Different tasks, menu functions, and views can be made available to time administrators according to the profile they use to access the Time Manager's Workplace.

You can also define field selections for the menu bar and toolbar that appear in the following screen areas in the TMW:

#### **Task selection (TSK):**

Here you create field selections in which the *Time Data Maintenance* and the *Message Processing* tasks are valid, or only one of the tasks.

#### **Views for the Maintain Time Data task (VTD):**

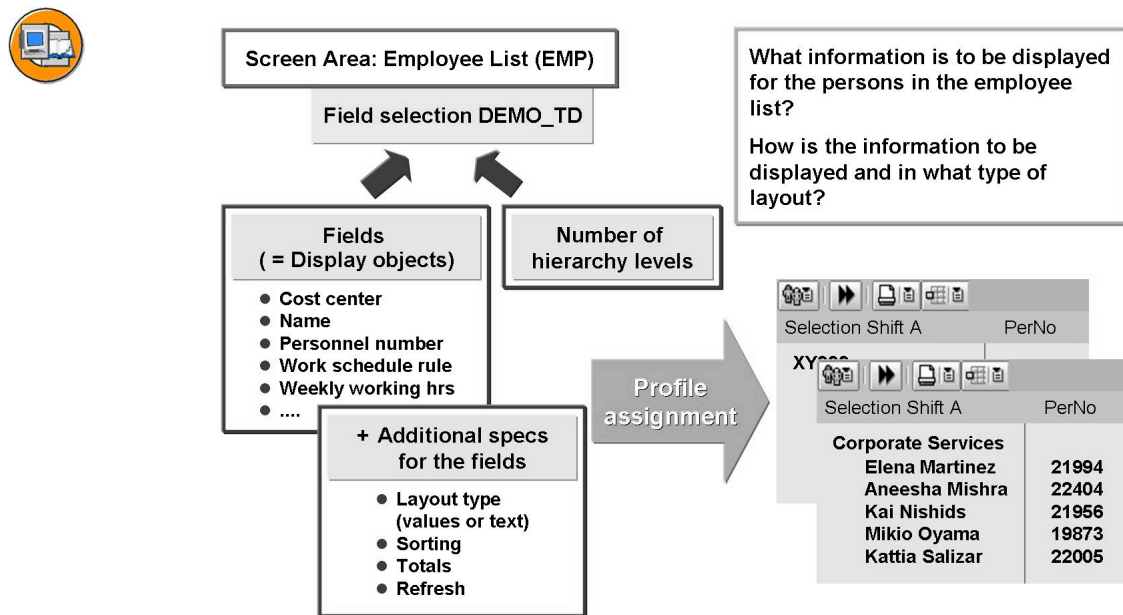
Here you create field selections for the *Time Data Maintenance* task, in which various combinations of *Multi-Day*, *Multi-Person*, *One-Day View*, and the *Team View* are defined.

#### **Views for Message Processing (VWL):**

Here you create the field selections for the *Message Processing* task.

#### **Menu functions (MEN):**

You can also create field selections for other configurable menu functions. You can use field selections to include the following menu options: On the *Utilities* menu, for the *Start time evaluation*, *Display time statement*, and *Call employee* menu options; on the *Environment* menu, for the *Maintain HR master data* and *Display HR master data* menu options.



**Figure 174: Field Selections for Employee Lists**

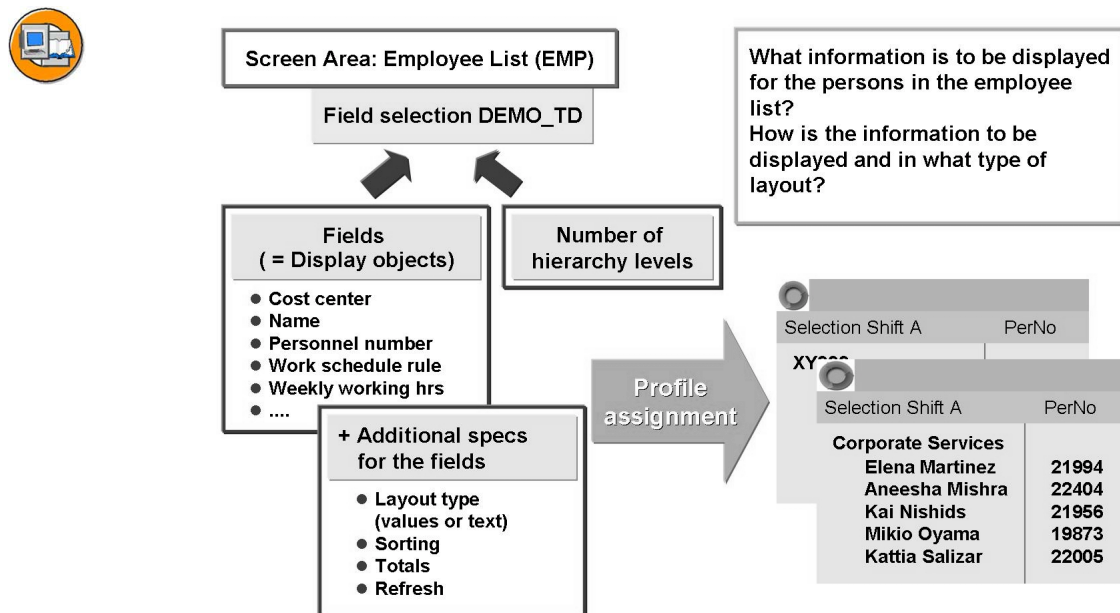
The field selection for the Employee List determines which information is available to the time administrators (according to their profiles) for the employees in their employee lists. In addition, you can define the appearance of the Employee List by assigning a hierarchy display.

A field selection contains the fields (cost center, personnel number, and so on) that are to be displayed to the time administrators. The fields to be used must be defined as display objects. If the display objects contained in the standard system are not sufficient, you can create your own by carrying out the activities in the following IMG section: *Personnel Time Management* → *Time Manager's Workplace* → *Basic Settings* → *Provide Information from Master Data and Time Data*.

You can also enter additional specifications for displaying selected fields (field value, text for field value, or icons) to be used for sorting, updating, or totals.

The employee list can be displayed in a hierarchy with one or two levels, or without a hierarchy. To use a hierarchy, you assign a hierarchy layout to the field selection.

If the layout type selected is hierarchy, then the system uses the first field or the first two fields to represent the hierarchy. The fields not used for the hierarchy are displayed as columns.



**Figure 175: Layout Selection for Employee Data**

In the *Employee Data* area, you can provide time administrators with additional information about the selected employee (such as HR master data or time account balances).

You define layouts in a first step. You can assign up to six display objects to a layout to display specific types of employee data (cost center, position, and so on). You also determine for each display object the position it is to have in the layout by indicating the column and row. A layout could thus contain fields such as the personnel number, position, cost center, and so on.

In a second step, you define field selections for the *Employee Data* area to which you then assign layouts. For example, you can define a field selection that is assigned layout 1 (with HR master data) and layout 2 (with time account balances).

In a third step, you assign each of the layout selections you want for employee data to the **profiles**. Time administrators to whom this field selection is assigned in their profiles will see the information from layout 1 as well as layout 2, and can toggle between the two different layouts.

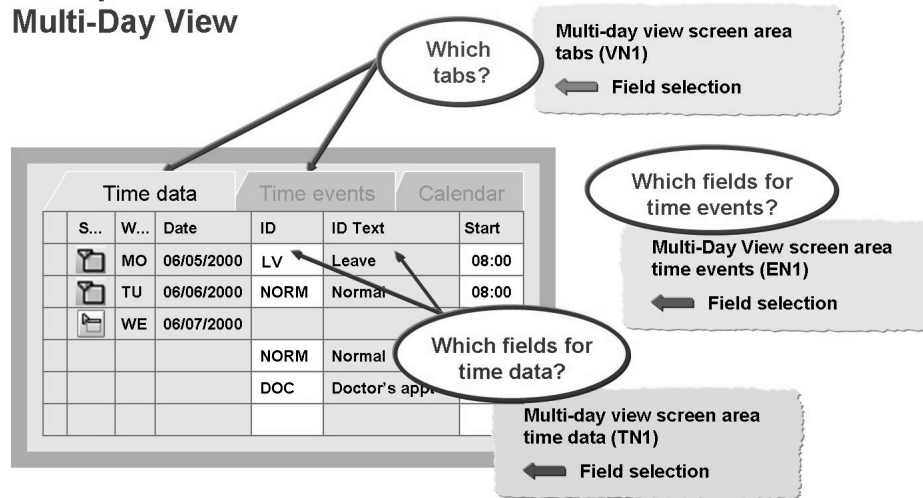
**Note:**

If the display objects available in the standard system are not sufficient, you can define your own in the *Basic Settings* section of the IMG.





### Example: Multi-Day View



**Figure 176: Field Selection for Maintaining Time Data (1)**

To maintain time data in the *Time Data Maintenance* task in the TMW, time administrators have, depending on their profiles, up to four views available to them: the *Multi-Day View*, the *Multi-Person View*, the *One-Day View*, and the *Team View*. You can customize the fields of the time data table and the tab pages displayed in all views.

As time administrators only see the relevant fields (columns) and tabs they require in their views of the TMW, they have a more customized workspace for entering time data.

The procedure for customizing the time data table and the tabs displayed is the same for all views (Multi-Day, Multi-Person, and One-Day).

**Example: Multi-Day View:** In the *Define Table for Time Data* activity, you specify the fields (columns) you want to be displayed and their sequence. To do so, you define field selections for screen area TN1 and assign the required fields to the field selections. You can also enter additional specifications, such as the number of fixed columns and whether fields defined as "ready for input" can actually be used as such.

The multi-day view also incorporates the *Time Events* screen area, in contrast to the other views. Here you also define field selections, this time for screen area EN1, which determine the fields (columns) available and the sequence in which they are to be displayed.

You use field selections for the VN1 screen area to determine which tabs can be used for time data maintenance in the Multi-Day View.



<b>Multi-Day View</b>	Fields for time data	(TN1)
	Fields for time events	(EN1)
	Tabs	(VN1)
	Calendar: Time data to be selected	(CAI)
	Calendar: Select views	(CAL)
	Calendar: Dominant fields	(CAD)
	Calendar: Apptmts w. clock times	(CAA)
<b>Multi-Person View</b>	Fields for time data	(T1M)
	Tabs	(V1M)
<b>One-Day View</b>	Dominant and processing instructions	(TDO)
	Fields for time data	(T11)
	Tabs	(V11)
<b>Team View</b>	Additional fields from dominant	(TNM)
	Tabs	(VNM)

**Figure 177: Field Selection for Maintaining Time Data (2)**

You define field selections for the other views in the same way. Each view has screen areas for which you can define field selections (see the figure above).

In the One-Day View, there is an additional screen area above the Time Data area, in which you can display the day dominant and checkboxes for processing instructions. The checkboxes are only relevant for time evaluation. To determine which, if any, of these fields are to be displayed in the One-Day View, you define applicable field selections for the TDO screen area.

**Note:**

If the tabs contained in the standard system are not sufficient for your purposes, you can create your own. To do so, copy the sample layouts provided by SAP. You must copy the templates to create your own tabs because they contain certain technical settings that are required for creating new tabs.

**Note:**

The settings for the *Time Data* screen area in the *Multi-Day View* are relevant for the *Time Data Maintenance* and the *Message Processing* tasks.



**Degree of detail for *Time Data* screen area**

- Collapse all as default
- Expand all as default
- Expand all partial-day time data as default

**TEC screen area**

Field selection **COLLAP**

*Collapse all as default field*

Field selection **EXPAND**

*Expand all as default field*

Field selection **EXPSEL**

*Expand all partial-day time data as default field*

Time data			Time events	Calendar
S...	W...	Date	ID	ID Text
	MO	06/05/2000	LV	Leave
	TU	06/06/2000	NORM	Normal
	WE	06/07/2000		
			NORM	Normal
			DOC	Doctor's appt
			EERI	EE remun. info
		.....	.....	.....

**Figure 178: Field Selection for Maintaining Time Data (3)**

In the Time Data screen area, you can have the system expand or collapse rows containing time data. Rows containing the dominants of the day are always shown.

The field selections specifying the degree of detail in the Multi-Day and Multi-Person Views indicate whether all rows are expanded or collapsed when the TMW is called, or only rows containing partial-day time data are to be expanded.

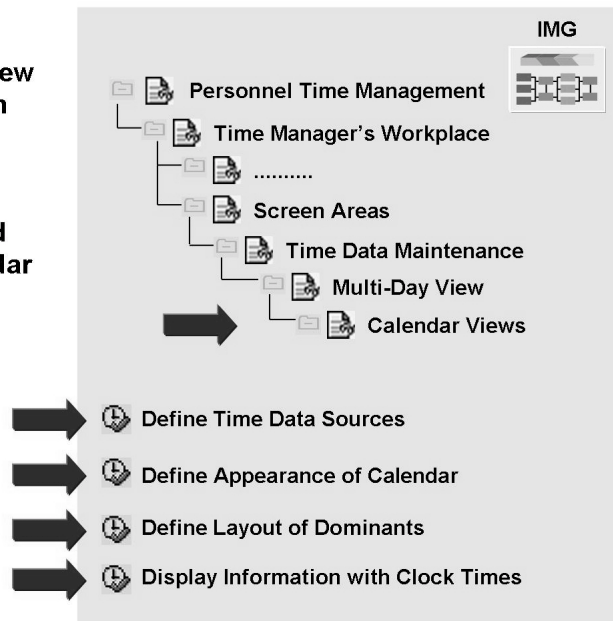
Once all of the tab and field selections have been created for the individual screen areas, you must then assign the selections to your profiles.

**Note:**

The customer enhancement **PTIMTMW** is available for the TMW. You can use this enhancement to customize how fields are filled. After activating the enhancement, your new fields must be added to the field selection for time data in the individual views. These fields cannot be used in the Time Events screen area.



- In R/3 Enterprise, new activities have been included for field selections so that you can customize the appearance and layout of the calendar views



**Figure 179: Customizing Field Selections for Calendar Views**

There are new activities for customizing the new field selections for the calendar. You can configure all four calendars, that is, the daily, weekly, monthly, and annual calendar.

The procedure is the same as for the field selections for other screen areas.

In the first step, you define the data sources from which you want to display information in the calendars. You can display data from the following sources:

Time data from the time infotypes supported by the TMW, with the exception of the Time Events infotype (2011)

Time pairs formed from the time events in the PT table (cluster B2), or in the TEVEN table if time evaluation was unable to form pairs for the period

Time events from the TEVEN table. If you want to display a lot of time data, you can choose to display the time events instead of the time pairs. This reduces the amount of information displayed in parallel in the calendar.

In the second step, you determine the information you want to be displayed in each calendar.

To can restrict the amount of information displayed so that the calendars are not overloaded. This is particularly important for the monthly and annual calendars so that they fit onto the screen without users having to scroll.

The information to be displayed in the calendar is divided in the activity into information blocks such as the dominant, planned time, data without clock times (such as full-day records, employee remuneration information), and so on. You can decide which of the information blocks you want to be displayed and their sequence.

In the third step, you specify the information that you want to output in the dominant row of the daily, weekly, and monthly calendar. You can vary the amount of information displayed according to the calendar type.

You can output fields from the following infotypes in the dominant row:

Planned Working Time (infotype 0007)

Absences (infotype 2001)

Attendances (infotype 2002)

Substitutions (infotype 2003)

You can also output customer fields in the dominant row. Three text fields and three hours fields are available. You can use the PTIMTMW SAP enhancement to fill the customer fields.

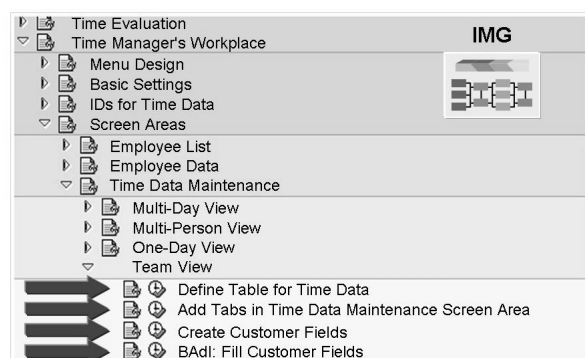
In the fourth step, you define how partial-day information with clock times is displayed.

When partial-day information is displayed in the weekly or daily calendar, there are often several rows available for time entries lasting several hours.

You can use these rows to display additional information about a time entry. Depending on how many additional lines are available, you may output a lot of additional information. In this activity, you specify the type and sequence of the information you want to display.



- **In R/3 Enterprise, new activities have been included for field selections so that you can customize the appearance and layout of the team view.**



**Figure 180: Customizing Field Selections for the Team View**

In the R/3 Enterprise release, there are new activities for customizing the new field selections for the team view. The procedure is the same as for the field selections for other screen areas. In the TNM screen area, you can define additional fields for the dominant, such as clock times, number of hours, breaks, or customized information.

In addition, in the team view you can fill and display customer-specific fields such as the number of employees off sick or on vacation. You can customized where you want the data to be displayed: on the left or right, at the top or bottom of the screen area. You can use the sample BAdI PT\_TMW\_NM\_BADI\_EXMPL to fill the fields with the required data.

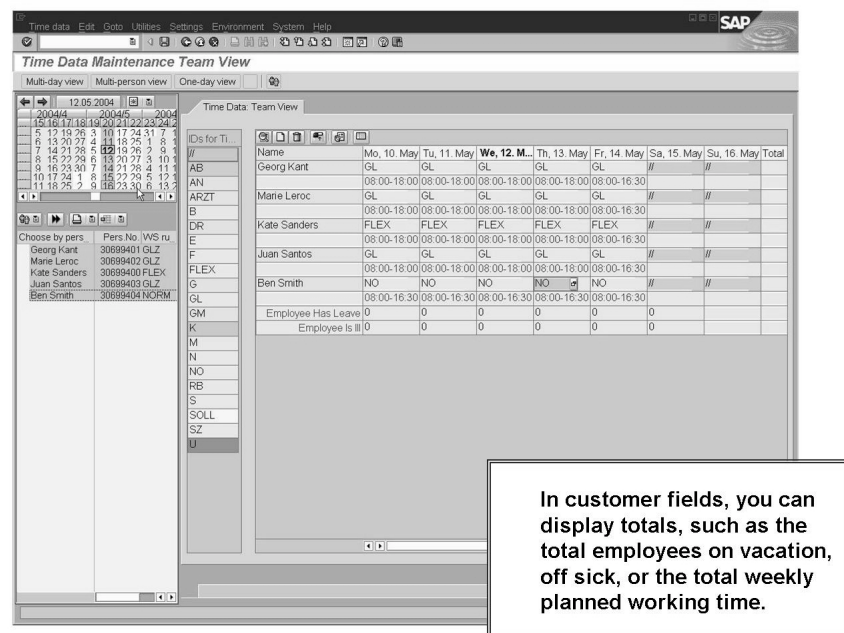
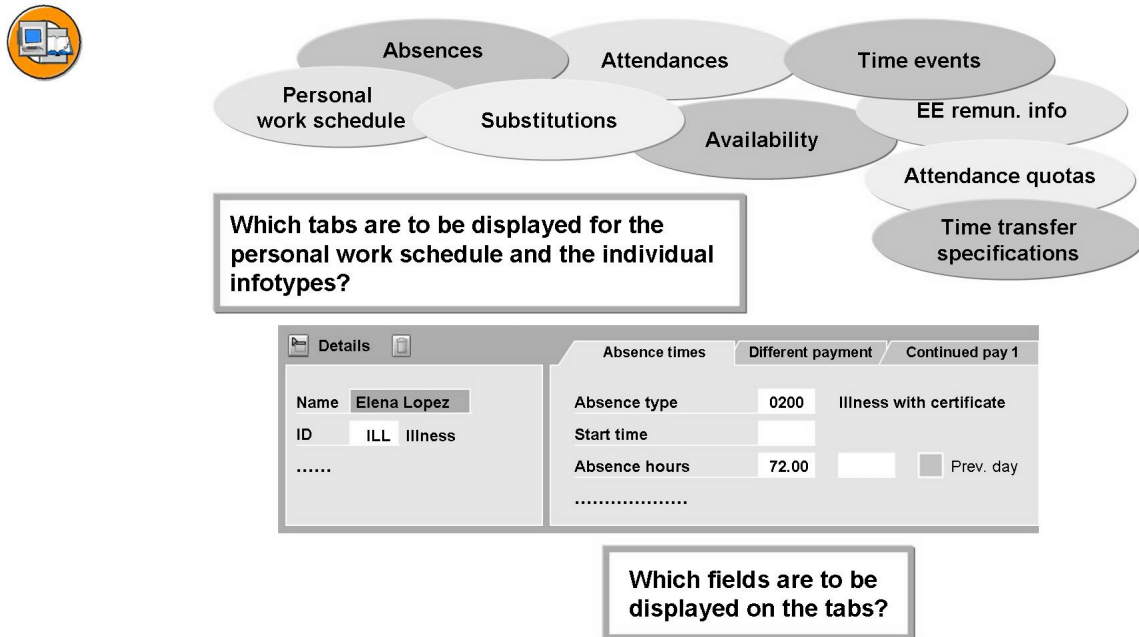


Figure 181: Displaying Customer-Specific Information



**Figure 182: Define Detail Screens (1)**

You can create tab and field selections for the Details area of the TMW and assign them to the required profiles.

A fixed number of tabs are available for the *Details* area for each infotype and for the personal work schedule. Certain fields can be displayed on the tabs.

The procedure for defining the the tab or field selections is the same for all infotypes and the personal work schedule.

In a first step, you create tab selections in which you specify which tabs are to be shown and in what sequence. If necessary, you can change the names of the tabs.

In a second step, you create field selections that specify which fields are to be displayed for each infotype or personal work schedule.

In a third step, you assign the tab and field selections to the profiles.

**Note:**

This option is mainly relevant for absences, and only partly applicable for attendances.

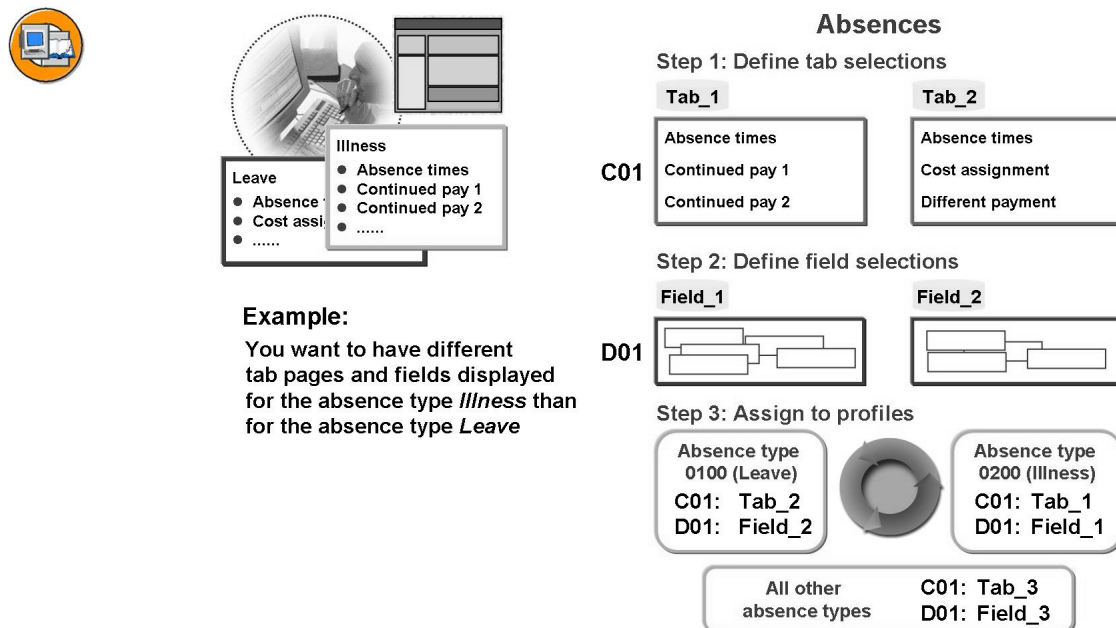


Figure 183: Define Detail Screens (2)

Tab and field selections can be assigned in a profile to specific subtypes according to the infotypes. In this way, you can display different tabs and fields for different subtypes of an infotype. If not all of the subtypes are to be assigned their own tab and field selections, you can assign the value *All other..(subtypes)* in the profile.

Note:

If no tab or field selections are entered for a profile for the Details area, the system will display all of the tabs and fields available in the standard system. Example:

You want to display the tabs *Absences*, *Continued Pay 1*, and *Continued Pay 2* for subtype **0200 (Illness)** of the *Absences* infotype (2001). For subtype **0100 (Leave)** of the same infotype, you want the tabs *Absence Times*, *Cost Assignment Receiver 1*, and *Different Payment* to be displayed.

In a first step, you create the tab selections "Illness" and "Leave." Then, in a second step, you create the field selection(s). In a third step, you assign the *Leave* tab selection to the subtype 0100 in the profile and the *Illness* tab selection to subtype 0200. You can also specify additional tab selections for other subtypes of the *Absences* infotype (2001).

As of the R/3 Enterprise release, a *Deduction* tab page is also available. You can incorporate it in the detail views of the *Absences*, *Attendances*, and *Attendance Quotas* infotypes. In the Absences and Attendances infotypes, it displays the quota



records from which the absence or attendance was deducted. In the *Attendance Quotas* infotype, it displays the attendances that have been deducted from the attendance approval.



- 510705: TMW: Customizing entries are not transported
- 514565: TMW does not write ALE pointer
- 455468: TMW: Message line in the upper screen area
- 447097: Questions and answers on the TMW implementation
- 421014: TMW calendar views - availability on 4.6C
- 415425: Transport of Customizing Settings
- 407303: Employee dialog box in the Time Manager's Workplace
- 392621: Preparation for color concept in Time Manager's Workplace
- 383750: BAdI for individual payroll days and hours
- 367301: TMW: Generation report for TCVIEW Customizing
- 367249: Customer enhancements for the BLP
- 201882: Time Manager's Workplace under Release 4.6B
- 598985: TMW Team View

The above slide shows a collection of the most important OSS notes. Please note that new SAP Notes about the topic are added continuously. To provide you with the most up-to-date information, SAP development continuously updates the consulting note 447097: "Questions and answers on the TMW implementation."

You can access the SAP Notes in your OSS system, or in the Internet under <http://service.sap.com/notes>. You can request a user for the service portal free of charge.



- SAP OSS
  - Component: PT-RC-UI-TMW (Time Manager's Workplace)
  - Consulting note 447097 (Questions and answers on the TMW implementation)
- Internet
  - <http://service.sap.com/hrtime> (SAP Service Marketplace)
  - Then choose Time Manager's Workplace / Media Center
  - TMW calendar views
  - Reports of TMW implementations
  - New features in the SAP Enterprise release
  - ScreenCams showing new TMW features

If you have questions about the Time Manager's Workplace, the above sources provide you with detailed information.



## Exercise 9: Using and Customizing the Time Manager's Workplace

### Exercise Objectives

After completing this exercise, you will be able to:

- Use the TMW and customize it to meet the requirements of time administrators in your enterprise

### Business Example

A variety of tasks are performed by time administrators in your company. By using different profiles, you can set up the TMW to meet the requirements of each task administrator. You carry out the required Customizing steps and create suitable time data IDs and profiles for the time administrators at the company.

### Task:

#### Create time data IDs

1. Modify the definition set **SET\_XX** to include additional time data IDs that will enable special absence types and changes to planned specifications to be recorded in the Time Manager's Workplace.

Create the following time data IDs:

Time data ID **L## (Leave group ##)** (where ## = your group number) for the absence type you previously created, **LE## (Leave)**:

*Absences* (infotype 2001)

Personnel subarea grouping **01**

Absence type **LE##**

Time data ID **N## (Normal group ##)** (## = your group number) for the following change in planned specifications:

*Substitutions* (infotype 2003)

Personnel subarea grouping **01**

Daily work schedule grouping **01**

Substitution type **02**

Daily work schedule **TZ##**

For the time data IDs you created in 1-1, determine how they are to be used within the subsets of definition set **SET\_XX**.

*Continued on next page*

Check whether the subsets **001** and **002** are already available in the definition set **SET\_XX**.

Define the use of time data IDs for subset **002** in the definition set **SET\_XX** so that time administrators can record time data using these time data IDs.

To do so, indicate that the newly created time data IDs are to be *default IDs* for subset **002**.

Find out about the difference between the indicators for *default IDs* and *input IDs*.

Define colors for the calendar view for your own time data IDs, **L##** and **N##**, in the **SET\_XX** definition set.

Choose the colors of your choice in the IMG activity *Define Colors of Time Data IDs*.

Check that your settings were made correctly by exiting and reentering the TMW.

## 2. Creating Profiles

Copy profile **Z\_HR306\_TIME\_ADMIN** to profile **Z\_##\_TIME\_AD** (## = group number).

Modify the *initial period* and the *person selection period* for your profile as follows:

The *initial period* is to comprise four weeks: the previous week, the current week, and the next two weeks. The first day of the week is a Monday.

The *person selection period* is to comprise one month before and one month after the initial period.

Make sure that time administrators to whom this profile is assigned are only able to access the applicable subset of IDs for this definition set.

## 3. Access the Time Manager's Workplace

In your user parameters, store the following values for the *Time Manager's Workplace*:

Definition set **SET\_XX**

ID Subset **002**

Profile **Z\_##\_TIME\_AD** (where ## is your group number)

Now access the *Time Manager's Workplace*.

## 4. Optional Exercise: Employee Selection

Check the user-independent standard selection stored in your profile **Z\_##\_TIME\_AD** (## = your group number).

*Continued on next page*

Which selection IDs are assigned?

Create for your user **HRTRAIN-##** (## = your group number) a user-specific selection which you can use to select all employees in personnel subarea **TP##** (## = your group number).

Define the selection ID **Z\_##** (## = your group number) to be used to select according to personnel subarea.

Assign this selection ID to the group **Z\_USER\_HR306** for your own user, **HRTRAIN-##**.

Assign the new user-specific selection to your profile.

#### 5. **Menu Design**

You want the **Z\_##\_TIME\_AD** profile (XX = your group number) to enable time administrators to access the following tasks, views, and menu functions:

*Time Data Maintenance* task

*All views* are to be available for this task

The following *menu function* is to be available for this task: Display master data

Check whether the corresponding field selections are already available. Pay particular attention to the time data IDs for the field selections. Assign the field selections to your profile **Z\_##\_TIME\_AD** (## = your group number).

#### 6. **Modify the Time Data screen area**

Modify the *Multi-Day View for Time Data* as follows:

##### **Define a field selection for the time data table in the Multi-Day View**

Define the field selection **MD\_##** (## = your group number) for the *Multi-Day View* of the time data table. Display the following fields:

Show/hide button

Weekday ID

Current date

More time data exists

Time data ID type

Time data ID text

Start time

End time

Duration of time data record in hours

*Continued on next page*

Cost center

### **Specify the appearance of the calendar**

Define a separate annual view, **##YEAR**, by copying the **306YEAR** annual view. You want the new annual view to contain the following additional information

Time data with clock times

This enables you to view partial-day records as well (such as Georg Kant's (30699401) doctor's appointment in January 2002). To be able to do so, you have to assign the setting to your profile, as described in 6-4.

### **Select tabs for the *Multi-Day View***

When users access the TMW using the profile you defined, you only want the *Time Data* tab, not the *Time Events* tab, to appear in the *Multi-Day View*.

Check whether a suitable field selection is already available.

### **Profile Assignment**

Assign the field selection **MD\_##** (## = your group number) you defined in 6-1 for time data in the *Multi-Day View*, the Customizing settings for the appearance **##YEAR** from 6-2, and the tab selection you checked in 6-3 for the *Multi-Day View* to your profile.

Check the degree of detail assigned to your profile. What does the degree of detail determine?

## **7. Specify details for the time data**

You only want information on the absence times and technical information for absence type **LE##** to appear in the Details screen area.

Define the field selection **2001\_##** (## = your group number) for the *Absences* infotype (2001) which is to include the following tabs:

Absence times

Technical information

All of the fields are to be included on the selected tabs. In other words, you do not need to hide fields explicitly.

Assign the tab selections defined under 6-1 to the absence type **LE##** (## = group number) in your profile.

Use the personnel subarea grouping **01**.

## **8. Check your settings for the TMW**

Access the TMW again and check the following settings:

### **Initial period**

*Continued on next page*

**Tasks, views, and menu functions****Tabs and fields for the *Time Data* screen area in the *Multi-Day View*****Tabs for the absence type LE## (## = your group number) in the *Details* screen area:**

Enter a one-day absence **LE##** for one of your employees using the time data ID **L##** (## = your group number) in the TMW. Check which tabs are available for this absence type in the *Details* screen area.

Note: If you have not completed the optional exercise on employee selection, then add your employees (**306991##** and **306992##**) temporarily to your employee list.

**Available employee lists****9. Additional Exercises: Using the TMW Calendar Views****Optional Exercises for the TMW Calendar Views**

Use the TMW calendar views to display time data in tasks 9-1 and 9-2, and to maintain time data in task 9-3.

(Please display, but do not maintain any data for Georg Kant, since all course participants have to access this personnel number.)

Which work schedule is assigned to Georg Kant (30699401) in January 2002? (Use the calendar views, for example, the annual calendar.)

When did Georg Kant (30699401) have a doctor's appointment in January 2002? (Use the monthly calendar and the daily calendar.)

**Maintain time data using the calendar views:**

Your employee Jane Miller (306993##, insert temporarily) had a doctor's appointment from 4 p.m. through 4:30 p.m. every Friday in the last month. Maintain this data using the copy and paste functions.

Your employee Jane Miller (**306993##**, insert temporarily) would like to take a week of leave next month. Enter the leave using the monthly or weekly calendar and the time data ID "L."

## Solution 9: Using and Customizing the Time Manager's Workplace

### Task:

#### Create time data IDs

1. Modify the definition set **SET\_XX** to include additional time data IDs that will enable special absence types and changes to planned specifications to be recorded in the Time Manager's Workplace.

Create the following time data IDs:

Time data ID **L## (Leave group ##)** (where ## = your group number) for the absence type you previously created, **LE## (Leave)**:

*Absences* (infotype 2001)

Personnel subarea grouping **01**

Absence type **LE##**

Time data ID **N## (Normal group ##)** (## = your group number) for the following change in planned specifications:

*Substitutions* (infotype 2003)

Personnel subarea grouping **01**

Daily work schedule grouping **01**

Substitution type **02**

Daily work schedule **TZ##**

For the time data IDs you created in 1-1, determine how they are to be used within the subsets of definition set **SET\_XX**.

Check whether the subsets **001** and **002** are already available in the definition set **SET\_XX**.

Define the use of time data IDs for subset **002** in the definition set **SET\_XX** so that time administrators can record time data using these time data IDs.

To do so, indicate that the newly created time data IDs are to be *default IDs* for subset **002**.

Find out about the difference between the indicators for *default IDs* and *input IDs*.

Define colors for the calendar view for your own time data IDs, **L##** and **N##**, in the **SET\_XX** definition set.

*Continued on next page*



Choose the colors of your choice in the IMG activity *Define Colors of Time Data IDs*.

Check that your settings were made correctly by exiting and reentering the TMW.

a) **Create time data IDs**

In the Implementation Guide (IMG) for Personnel Time Management, choose *Time Manager's Workplace* → *Time Data IDs* → *Create Definition Sets and Time Data IDs*.

To check whether the definition set **SET\_XX** was already created, choose the *Create Definition Sets* activity. Make sure that an entry already exists for the definition set **SET\_XX**.

To create additional time data IDs for the definition set **SET\_XX**, choose the *Define Time Data IDs for Each Time Data Type* activity:

**Create time data ID L## (## = your group number):**

Choose *New entries*. In the next screen, choose the *Absences* tab and enter the following data:

Field Name	Value
Definition set	<i>SET_XX</i>
ID	<i>L## (## = your group number)</i>
Short text	<i>Leave Group ##</i>
PS grouping	<i>01</i>
Absence type	<i>LE##</i>

**Create time data ID N## (## = your group number):**

Choose *New entries* or *Goto* → *Next entry*, leave the *Planned Specifications* tab as the default, and enter the following data:

Field Name	Value
Definition set	<i>SET_XX</i>
ID	<i>N## (## = your group number)</i>
Short text	<i>Normal Group ##</i>
PS grouping	<i>01</i>
DWS grouping	<i>01</i>
Substitution type	<i>02 (shift substitution)</i>
Daily WS	<i>TZ## (or S-11)</i>

*Continued on next page*

Save your entries. Then choose *Back* to return to the *Change View "Define Time Data IDs": Overview* screen.

### Using Time Data IDs

To check whether subsets **001** and **002** are available for the definition set **SET\_XX**, choose *Personnel Time Management → Time Manager's Workplace → IDs for Time Data → Define Subsets and IDs*.

Then choose the *Create Subsets for Time Data IDs* activity. Subsets **001** and **002** ought to be available in the following view for definition set **SET\_XX**.

Choose the *Specify Use of IDs for a Subset* activity to determine how the time data IDs you created for subset **002** in the definition set **SET\_XX** are used.

In the following dialog box, enter **SET\_XX** as the definition set and **002** as the subset.

In the following view, activate the *Default ID* radio button for the time data IDs **L##** and **N##** you created (## = your group number).

All of the time data IDs you created must be assigned as *Default* time data IDs, because each of the IDs is only valid for one subtype of the corresponding infotype. If more than one subtype of an infotype were to be represented by a time data ID, then one of the subtypes would have to have the indicator *Default ID* and the other the indicator *Input ID*.

### Define colors for the calendar view for your own time data IDs, **U##** and **N##**, in the **SET\_XX** definition set.

Choose the colors of your choice in the IMG activity *Define Colors of Time Data IDs*.

Go to the *Define Colors of Time Data IDs* activity in the IMG.

Enter **SET\_XX** as the definition set. Locate your time data IDs, **L##** and **N##** in the list and select a color of your choice for each, for example, red for **L##** and green for **N##**.

Check that your settings were made correctly by exiting and reentering the TMW.

## 2. Creating Profiles

Copy profile **Z\_HR306\_TIME\_ADMIN** to profile **Z\_##\_TIME\_AD** (## = group number).

Modify the *initial period* and the *person selection period* for your profile as follows:

*Continued on next page*

The *initial period* is to comprise four weeks: the previous week, the current week, and the next two weeks. The first day of the week is a Monday.

The *person selection period* is to comprise one month before and one month after the initial period.

Make sure that time administrators to whom this profile is assigned are only able to access the applicable subset of IDs for this definition set.

a) **Creating Profiles**

To copy profile **Z\_HR306\_TIME\_ADMIN** to profile **Z\_##\_TIME\_AD** (## = group number), choose *Time Manager's Workplace* → *Menu Design* → *Create Profiles and Assign Field Selections* in the IMG for Personnel Time Management.

In the following view, select profile **Z\_HR306\_TIME\_ADMIN** and then choose the *Copy as...* button or *Edit* → *Copy as...*

Select **Z\_##\_TIME\_AD** (## = group number) as your profile template and then give your profile its own name. Choose *Enter* and confirm the information box that appears by choosing *Enter*. The *Change View "Define Profile": Overview* screen reappears. Save your entries.

**Modify Initial Period and Person Selection Period**

In the *Change View "Define Profile": Overview* screen, select the profile you created, **Z\_##\_TIME\_AD**, and then choose the *Details* button or *Goto* → *Details*.

In the *Initial Period* screen area, enter the following data:

Field Name	Value
Period	<i>Current week</i>
Relative position period	-
Direction	-
Relative start date	<i>1 week</i>
Relative end date	<i>2 weeks</i>
Week beginning	<i>Monday</i>

In the *Selection period relative to initial period* screen area, enter the following data:

Field Name	Value
Relative start date	<i>1 month</i>
Relative end date	<i>1 month</i>

*Continued on next page*

### Access defined subset of a definition set

To make sure that time administrators who are assigned the **Z\_##\_TIME\_AD** profile can only access their specific subset of IDs for the corresponding definition area, scroll down on the *Further Settings* tab. Make sure that the *Subset IDs can be changed* option is not activated.

### 3. Access the Time Manager's Workplace

In your user parameters, store the following values for the *Time Manager's Workplace*:

Definition set *SET\_XX*

ID Subset *002*

Profile **Z\_##\_TIME\_AD** (where ## is your group number)

Now access the *Time Manager's Workplace*.

#### a) Accessing the Time Manager's Workplace

To store the **Z\_##\_TIME\_AD** profile and the definition set **SET\_XX** with subset **002** in the user parameters for your user, choose:

*System → User Profile → Own Data.*

In the *Maintain User Profile* screen, choose the *Parameters* tab and enter the following data:

Parameter	Value
<i>PT_TMW_PROFILE</i>	<i>Z_##_TIME_AD</i>
<i>PT_TMW_TDLANGU</i>	<i>SET_XX/002</i>

where ## = your group number

To access the *Time Manager's Workplace*, choose:

*Human Resources → Time Management → Administration → Time Manager's Workplace*

### 4. Optional Exercise: Employee Selection

Check the user-independent standard selection stored in your profile **Z\_##\_TIME\_AD** (## = your group number).

Which selection IDs are assigned?

Create for your user **HRTRAIN-##** (## = your group number) a user-specific selection which you can use to select all employees in personnel subarea **TP##** (## = your group number).

*Continued on next page*

Define the selection ID **Z\_##** (## = your group number) to be used to select according to personnel subarea.

Assign this selection ID to the group **Z\_USER\_HR306** for your own user, **HRTRAIN-##**.

Assign the new user-specific selection to your profile.

a) **Check the user-independent standard selection in the Z\_##\_TIME\_AD profile.**

In the IMG, choose *Personnel Time Management → Time Manager's Workplace → Employee Selection → Assign Employee Selection to Profiles*.

Select your profile **Z\_##\_TIME\_AD** and then choose the *Details* button or *Goto → Details*.

In the subsequent screen, the following setting should be made in the *Settings* tab in the *Standard selection using selection criteria* section of the *Employee selection* area:

User-specific selections according to group	<b>Z_TMW_HR306</b>
---	--------------------

To check which selection IDs are assigned to this group, choose *Personnel Time Management → Time Manager's Workplace → Employee Selection → Define Groupings*.

In the subsequent screen, select the **Z\_TMW\_HR306** group and then double-click the *Grouping* option in the *Dialog Structure* in the left area of the screen.

The selection ID **TMW\_TIME\_ADMIN** and another selection ID specifically set up for the HR306 course should already be assigned, that is, the following entries should be displayed:

Group	User	Seq...	Sel.ID
<b>Z_TMW_HR306</b>		001	<b>Z_HR306_PER-SNR</b>
<b>Z_TMW_HR306</b>		002	<b>Z_HR306_TMW_TIME_AD</b>

**Meaning of Selection IDs:**

**Z\_HR306\_PERSNR:**

The selection ID **Z\_HR306\_PERSNR** was created specifically for the HR306 course. Personnel numbers from **30699400 – 30699404** are included in the selection.

*Continued on next page*

**Z\_HR306\_TMW\_TIME\_AD:**

Selection ID **TMW\_TIME\_ADMIN** is included in the standard system. It is used to select all of the employees who are assigned to an administrator by means of the administrator ID in the *Time* field of the *Organizational Assignment* infotype (0001).

**Create a user-specific selection**

To define a selection ID to select all employees in the personnel subarea **TP##** (## = your group number), choose *Personnel Time Management* → *Time Manager's Workplace* → *Employee Selection* → *Define Selection IDs*.

Choose the *New entries* option, or choose *Edit* → *New entries*.

In the screen area on the right, enter the following data:

Selection ID	Selection text
Z_##	Selection by personnel subarea TP##

Choose *Enter* to confirm your entries and then save your data.

Select this entry and double-click on the *Table* option from the dialog structure in the screen area to the left.

Choose *New entries* and enter the following data:

Sel.ID	Seq..	Seq..	Obj.class	Inf...	Field name	Field type
Z_##	1	1	Per-sons	0001	BTRTL	Info-type field

No entries are required in the other remaining fields.

Save your entries.

Select this entry and double-click on the *Ranges* option from the dialog structure in the left screen area.

Choose *New entries* and enter the following data:

Selection ID	No.	No.	No.	INCL/EXCL	Option	Selection value
Z_##	1	1	1	1	EQ	TP##

*Continued on next page*

## = your group number

No entries are required in the other remaining fields.

Save your entries.

To assign the defined selection ID to group **Z\_USER\_HR306** for specific users, choose *Personnel Time Management → Time Manager's Workplace → Employee Selection → Define Groupings*.

In the right screen area, select group **Z\_USER\_HR306** and then choose the *Grouping* option in the left screen area in the dialog structure.

Enter the following data:

Group	User	Seq.no.	Sel.ID
<b>Z_USER_HR306</b>	HRTRAIN-##	Any number	Z_##

where ## = your group number

Enter any number as the sequential number.

Save your entries.

To assign the new user-specific selection to your profile, choose *Personnel Time Management → Time Manager's Workplace → Employee Selection → Assign Employee Selection to Profiles*.

Select your profile **Z\_##\_TIME\_AD** and then choose the *Details* button or *Goto → Details*.

In the *Employee Selection* area, enter the following data in the *Standard selection using selection criteria* area:

User-specific selections according to group	<b>Z_USER_HR306</b>
---	---------------------

Save your entries.

## 5. Menu Design

You want the **Z\_##\_TIME\_AD** profile (XX = your group number) to enable time administrators to access the following tasks, views, and menu functions:

*Time Data Maintenance* task

*All views* are to be available for this task

The following *menu function* is to be available for this task: Display master data

*Continued on next page*

Check whether the corresponding field selections are already available. Pay particular attention to the time data IDs for the field selections. Assign the field selections to your profile **Z\_##\_TIME\_AD** (## = your group number).

a) **Menu Design**

In the IMG for Personnel Time Management, choose *Time Manager's Workplace* → *Menu Design*.

**Check field selections for the tasks**

To do so, choose the *Define Task Selection* activity.

Select the field selection **TDE** (for the *Maintain Time Data* task) and then double-click on the *Field Customizing* option from the *Dialog Structure*. Only the *Maintain time data* field (that is, the task) should be assigned to the field selection **TDE**.

Screen area	Field selection
TSK (task selection)	<i>TDE</i>

**Check field selections for the task views**

To check the field selections for the views for the tasks, choose the *Define Views for Tasks* option.

Choose the *Define Views for Time Specifications Tasks* activity.

Select the field selection **ALL** (*All Views: Multi-Day, Multi-Person, One-Day*) and then double-click on the *Field Customizing* option from the *Dialog Structure*. The *Multi-Day, Multi-Person*, and the *One-Day* fields (that is, the views) should be assigned to the field selection **ALL**.

Screen area	Field selection
VTD (Views for the <i>Maintain Time Data</i> task)	<i>ALL</i>

**Check field selections for menu functions**

To check the field selections for the menu functions (for the *Maintain Time Data* task), choose the *Define Menu Functions* step in the IMG.

Then choose the *Define Menu Functions* activity.

Select the field selection **Z\_HR306** (*Display Only Master Data*) and then choose the *Field Customizing* option. The *Display HR master data* field (that is, the menu option) should be assigned to the **Z\_HR306** field selection.

*Continued on next page*



Screen area	Field selection
MEN (Menu functions)	Z_HR306

### Assign field selections for the individual screen areas in the profile

To assign the field selections for the individual screen areas to the profile, choose the *Create Profiles and Assign Field Selections* activity in the IMG.

Select the **Z\_##\_TIME\_AD** profile (## = group number) from the view and then choose the *Assign Field Selection* option in the *Dialog Structure*.

In the subsequent *Determine Work Area: Entry* dialog box, the selected profile is displayed as the default value.

Place your cursor on the field for the screen area and choose the possible entries help option (F4) to see a list of the possible values for the screen areas.

Choose a screen area (such as **TSK** for task selection) and then choose *Enter*. Assign the corresponding field selection (such as **TDE** for the *Maintain Time Data* task) to the screen area.

Assign the following field selections to the individual screen areas in the profile:

Screen area	Field selection
TSK (task selection)	TDE
VTD (Views for the <i>Maintain Time Data</i> task)	ALL
MEN (Menu functions)	<b>Z_HR306</b> (for the <i>Maintain Time Data</i> task)

### Note:

The assignment of field selections in the *MEN* screen area for menu functions is task-specific. You assign the field selection **Z\_HR306** to the *Maintain Time Data* task for the *MEN* screen area.

## 6. Modify the *Time Data* screen area

Modify the *Multi-Day View for Time Data* as follows:

### Define a field selection for the time data table in the Multi-Day View

Define the field selection **MD\_##** (## = your group number) for the *Multi-Day View* of the time data table. Display the following fields:

*Continued on next page*

Show/hide button

Weekday ID

Current date

More time data exists

Time data ID type

Time data ID text

Start time

End time

Duration of time data record in hours

Cost center

### **Specify the appearance of the calendar**

Define a separate annual view, **##YEAR**, by copying the **306YEAR** annual view. You want the new annual view to contain the following additional information

Time data with clock times

This enables you to view partial-day records as well (such as Georg Kant's (30699401) doctor's appointment in January 2002). To be able to do so, you have to assign the setting to your profile, as described in 6-4.

### **Select tabs for the *Multi-Day View***

When users access the TMW using the profile you defined, you only want the *Time Data* tab, not the *Time Events* tab, to appear in the *Multi-Day View*.

Check whether a suitable field selection is already available.

### **Profile Assignment**

Assign the field selection **MD\_##** (## = your group number) you defined in 6-1 for time data in the *Multi-Day View*, the Customizing settings for the appearance **##YEAR** from 6-2, and the tab selection you checked in 6-3 for the *Multi-Day View* to your profile.

Check the degree of detail assigned to your profile. What does the degree of detail determine?

#### **a) Define a field selection for the time data table in the *Multi-Day View***

In the IMG, choose *Personnel Time Management* → *Time Manager's Workplace* → *Screen Areas* → *Maintain Time Data* → *Multi-Day View* → *Define Table for Time Data*.

*Continued on next page*

Choose the *New entries* option, or choose *Edit* → *New entries*.

Enter **MD\_##** (## = your group number) as the field selection and give it an appropriate name.

In the *No. of fixed columns* field, enter the number of columns that you want users to see each time. SAP recommends using five fixed columns.

Save your entries.

Select the field selection you created. To assign fields to it, choose *Field Customizing*.

Choose the *Select fields* button. To assign fields to your field section, select the following fields from the left area of the screen:

To transfer the selected fields, choose the right arrow button (the top button in the dialog box). The fields are now included in the *Selected Fields* screen area. You can change the position of fields on the screen by selecting the field and then choosing the up or down arrows. The sequence in which the fields are sorted here determines how they are displayed later in the *Multi-Day View*.

- Show/hide button
- Weekday ID
- Current date
- More time data exists
- Time data ID type
- Time data ID text
- Start time
- End time
- Duration of time data record in hours
- Cost Center

Confirm your entries by choosing *Enter*. Copy the default display lengths for your fields. Check whether the fields allowed for data entry are also indicated as “ready for input.”

Save your entries.

### **Specify the appearance of the calendar**

In the IMG, choose *Personnel Time Management* → *Time Manager's Workplace* → *Screen Areas* → *Maintain Time Data* → *Multi-Day View* → *Calendar Views* → *Define Appearance of Calendar*.

Copy the **306YEAR** entry and name it **##YEAR**.

*Continued on next page*

Select the field selection you created. To assign fields to it, choose *Field Customizing*.

Choose the *Select fields* button.

Add the Time Entry with Clock Times fields to the existing fields.

Save your entries.

This enables you to view partial-day records as well. (such as Georg Kant's (30699401) doctor's appointment in January 2002). To be able to do so, you have to assign the setting to your profile, as described in 6-4.

### Select tabs for the *Multi-Day View*

In the IMG, choose *Personnel Time Management → Time Manager's Workplace → Screen Areas → Time Data Maintenance → Multi-Day View → Add Tabs in Time Data Maintenance Screen Area*.

Choose the *Add Tabs in Time Data Maintenance Screen Area* step.

In the next view, select the *TDE\_ONL* field selection and then double-click on the *Field Customizing* option from the *Dialog Structure*. Only the *Time data* field (that is, the tab) is assigned to this field selection.

### Profile Assignment

In the IMG, choose *Personnel Time Management → Time Manager's Workplace → Screen Areas → Time Data Maintenance → Assign Field Selections to Profiles*.

Select the **Z\_##\_TIME\_AD** profile (## = group number) from the view and then choose the *Assign Multi-Day View* option in the *Dialog Structure*.

In the *Determine Work Area: Entry* dialog box, your profile is displayed as the default value.

- **Assigning Field Selection for Time Data Table in Multi-Day View**

Enter **TN1** as the screen area and then choose *Enter*.

Assign the **MD\_##** field selection (## = your group number) you created in the following screen.

Save your entries and return by choosing the green arrow.

- **Assigning the Appearance of Calendar Field Selection**

*Continued on next page*

Select again the **Z\_##\_TIME\_AD** profile (## = group number) from the view and then choose the *Assign Multi-Day View* option in the *Dialog Structure*.

Enter **CAL** as the screen area and then choose *Enter*.

Assign the **##YEAR** field selection in the following screen under the annual calendar.

Save your entries.

- **Assigning Field Selection for Tab Strips in Multi-Day View**

Select again the **Z\_##\_TIME\_AD** profile (## = group number) from the view and then choose the *Assign Multi-Day View* option in the *Dialog Structure*.

Enter **VN1** as the screen area and then choose *Enter*.

Assign field selection **TDE\_ONL** in the following screen.

Save your entries.

- **Checking the Assigned Level of Detail**

Double-click on the *Assign degree of detail* option from the *Dialog Structure*:

The field selection **COLLAP** (*Hide all in initial screen*) is assigned to the *Maintain Time Data* task. This means that only the information included in the dominant for the day is displayed when the *Multi-Day View* and the *Multi-Person View* are first accessed. Any additional time data for that day is collapsed initially.

## 7. Specify details for the time data

You only want information on the absence times and technical information for absence type **LE##** to appear in the Details screen area.

Define the field selection **2001\_##** (## = your group number) for the *Absences* infotype (2001) which is to include the following tabs:

Absence times

Technical information

All of the fields are to be included on the selected tabs. In other words, you do not need to hide fields explicitly.

Assign the tab selections defined under 6-1 to the absence type **LE##** (## = group number) in your profile.

Use the personnel subarea grouping **01**.

*Continued on next page*

a) **Create a field selection for the *Absences* infotype (2001)**

In the IMG, choose *Personnel Time Management → Time Manager's Workplace → Screen Areas → Details for Time Data → Specify Detail Screens for Absences Infotype (2001)*.

Choose the *Select Tabs* activity.

To create a new field selection, choose *New entries* or *Edit → New entries*.

Enter **2001\_##** (## = your group number) as the field selection in the following view and then enter a text for it. Save your entries.

Select the **2001\_##** field selection you just created and then double-click on the *Field Customizing* option from the *Dialog Structure*.

Choose the *Select fields* button.

In the *Field selection* dialog box, select the following fields from the *Selection fields* section on the left side of the screen:

- Absence times
- Technical info

Then choose the right arrow (the top button). The selected fields are now in the *Selected Fields* screen area. You can change the position of fields on the screen by selecting the field and then choosing the up or down arrows. The sequence in which the tabs are sorted here determines how they are displayed later in the *Details* area for the absences to which this tab selection is assigned in the profile. Confirm your entries by choosing *Enter* then save. Return to the IMG by choosing the green arrow.

**Assigning tab selection in profile for absence type LE##**

In the IMG, choose *Personnel Time Management → Time Manager's Workplace → Screen Areas → Details for Time Data → Assign Field Selections to Profiles*.

Select profile **Z\_##\_TIME\_AD** (## = your group number) and then double-click on the *Assign field selection* option in the *Dialog Structure*.

In the dialog box, check that your profile appears, and then enter **C01** (*Details: Tabs for Absences Infotype (2001)*) as the screen area.

To assign the field selection you created for the tabs in the *Details* area to your absence type **LE##** (## = your group number), choose *New entries* or *Goto → New entries*.

Choose **01,LE##** (## = your group number) as the layout ID and then assign your tab selection **2001\_##** to it.

*Continued on next page*

Save your entries and return by choosing the green arrow.

To check the field selection for the fields to be displayed in the tabs for the *Details* area, select your profile **Z\_##\_TIME\_AD** (## = your group number) from the *Define Profile: Overview* screen and then double-click on the *Field Customizing* option in the *Dialog Structure*.

Enter **D01** as the screen area and then choose *Enter*.

In the following screen, check which field selection is assigned to the *All remaining absences* layout ID. The field selection **2001\_A** (*Absences with payroll information*) should be assigned. All fields are assigned in this field selection. In other words, all fields for the selected tabs are available.

#### 8. Check your settings for the TMW

Access the TMW again and check the following settings:

##### **Initial period**

##### **Tasks, views, and menu functions**

##### **Tabs and fields for the *Time Data* screen area in the *Multi-Day View***

##### **Tabs for the absence type LE## (## = your group number) in the *Details* screen area:**

Enter a one-day absence **LE##** for one of your employees using the time data ID **L##** (## = your group number) in the TMW. Check which tabs are available for this absence type in the *Details* screen area.

Note: If you have not completed the optional exercise on employee selection, then add your employees (**306991##** and **306992##**) temporarily to your employee list.

##### **Available employee lists**

##### a) **Accessing the Time Manager's Workplace**

To access the *Time Manager's Workplace*, choose *Human Resources* → *Time Management* → *Administration* → *Time Manager's Workplace*.

##### **Check initial period**

When you call the TMW, a period of four weeks should be selected in the *Calendar* screen area (the current week, the previous week, and the following two weeks).

##### **Check tasks, views, and menu functions**

- **Tasks:**

*Continued on next page*

Only the *Maintain Time Data* task should be available. In other words, the *Process Messages* task (under the *Goto* menu option) should be inactive.

- **Views:**

The *Multi-Day View*, *Multi-Person View*, and the *One-Day View* should be displayed in the menu bar.

- **Menu functions:**

Only the *Display HR master data* option should be activated in the *Environment* menu. The functions in the *Utilities* menu should all be inactive (*Start time evaluation*, *Display time statement form*, and *Call employee*).

**Check tabs and fields for the *Time Data* screen area in the *Multi-Day View***

- **Tab pages:**

Only the *Time Data* and the *Calendar* tabs should be displayed.

- **Fields:**

Only the following fields should be displayed:

Show/hide button

Weekday ID

Current date

More time data exists

Time data ID type

Time data ID text

Start time

End time

Duration of time data record in hours

Cost center

**Check tabs in *Details* area for absence type LE##**

**Employee selection**

In the *Employee Lists* screen area, choose the *Employee list* button and then the *Temporarily insert employee* option.

Enter the personnel number of your employee Karin Anderson **306992##** (## = your group number) and then choose *Enter*.

*Continued on next page*



Repeat this step to add your second employee, **306991##**, (## = your group number) to the list.

If you completed Exercise 6, then you can also make your selection using personnel subarea **TP##** from the *Employee Lists* screen area by choosing the *Employee list* option. If you click on it, both of your employees (**306991##** and **306992##**) are displayed.

#### **Enter a one-day leave record using time data ID L##**

Double-click on one of your employees from the employee list.

Overwrite the time data ID for the planned specification (**PLAN**) for one of the selected days in the *Time Data* screen area with the time data ID **L##** (## = your group number). Select the entry and choose the *Details* button (below left in the *Time Data* screen area): The *Absence Times* and *Technical Information* tabs should be displayed for the absence type **LE##**.

Save your entries.

#### **Check employee selection (optional exercise)**

In the *Employee Lists* area, choose the *Employee List* button to view the selection using your personnel subarea **TP##**. If you click on it, both of your employees (**306991##** and **306992##**) are displayed.

### **9. Additional Exercises: Using the TMW Calendar Views**

#### **Optional Exercises for the TMW Calendar Views**

Use the TMW calendar views to display time data in tasks 9-1 and 9-2, and to maintain time data in task 9-3.

(Please display, but do not maintain any data for Georg Kant, since all course participants have to access this personnel number.)

Which work schedule is assigned to Georg Kant (30699401) in January 2002? (Use the calendar views, for example, the annual calendar.)

When did Georg Kant (30699401) have a doctor's appointment in January 2002? (Use the monthly calendar and the daily calendar.)

#### **Maintain time data using the calendar views:**

Your employee Jane Miller (306993##, insert temporarily) had a doctor's appointment from 4 p.m. through 4:30 p.m. every Friday in the last month. Maintain this data using the copy and paste functions.

Your employee Jane Miller (**306993##**, insert temporarily) would like to take a week of leave next month. Enter the leave using the monthly or weekly calendar and the time data ID "L."

#### **a) Optional Exercises for the TMW Calendar Views**

*Continued on next page*

Use the TMW calendar views to display time data in tasks 9-1 and 9-2, and to maintain time data in task 9-3.

(Please display, but do not maintain any data for Georg Kant, since all course participants have to access this personnel number.)

Which work schedule is assigned to Georg Kant (30699401) in January 2002? (Use the calendar views, for example, the annual calendar.)

In the calendar in the upper left screen area, select January 2002.

Go to the *Calendar* tab page and choose the monthly or annual calendar.

You will see that the employee was assigned a different work schedule for this month. In the months before and after January, he has his regular work schedule.

When did Georg Kant (30699401) have a doctor's appointment in January 2002? (Use the monthly calendar and the daily calendar.)

In the calendar in the upper left screen area, select January 2002.

Go to the Calendar tab page and choose the monthly calendar.

The doctor's appointment is displayed in color. Click on the day to select it, and go to the weekly or daily calendar to view the partial-day information.

#### **Maintain time data using the calendar views:**

Your employee Jane Miller (306993##, insert temporarily) had a doctor's appointment from 4 p.m. through 4:30 p.m. every Friday in the last month. Maintain this data using the copy and paste functions.

Go to the Calendar tab page and choose the monthly calendar.

Drag the DOC time data ID from the ID bar to the first Friday of the month.

The entry is displayed in red, since only partial-day records are permitted and the times have not been entered.

Double-click on the entry to open the detail area.

In the Start time field, enter 16:00 – 16:30 and choose Enter to confirm.

You have now finished processing the record. Close the detail area by choosing the button at the top left of the area.

Copy the entry:

1. Select the entry and choose the *Copy* icon.
2. Select the next Friday and choose the *Paste* icon.
3. Repeat step 2) for all Fridays in that month.

*Continued on next page*

If you paste an entry incorrectly, select it and choose the Delete icon.

Save your entries.

Your employee Jane Miller (**306993##**, insert temporarily) would like to take a week of leave next month. Enter the leave using the monthly or weekly calendar and the time data ID “L.”

Select the relevant month in the calendar in the top left screen area.

Choose the monthly view in the calendar.

Select a week, and drag the time data ID “L” to the Monday of that week.

Double-click on the entry to open the detail area.

In the Date field, change the end date to Friday of this week.

Choose Enter to confirm your entries and then save your data.



## Exercise 10: TMW Team View (Optional)

### Exercise Objectives

After completing this exercise, you will be able to:

- Use the TMW and customize it to meet the requirements of time administrators in your enterprise

### Business Example

A variety of tasks are performed by time administrators in your company. By using different profiles, you can set up the TMW to meet the requirements of each task administrator. You carry out the required Customizing steps and create suitable time data IDs and profiles for the time administrators at CAB.

### Task:

Maintain time data using the team view



**Hint:** If you have not completed the optional exercise on employee selection, insert your employees (306991## and 306992##) temporarily to your employee list. (Please maintain data for your own employees only, since other course participants require access to the other employees.)

1. Your employees are assigned the work schedule "N" for the current week. How does the weekly planned working time change?
2. One of these two employees was off sick in the previous week. Record this in the system and take note of the *Employee Is Ill* totals line.

## Solution 10: TMW Team View (Optional)

### Task:

Maintain time data using the team view



**Hint:** If you have not completed the optional exercise on employee selection, insert your employees (306991## and 306992##) temporarily to your employee list. (Please maintain data for your own employees only, since other course participants require access to the other employees.)

1. Your employees are assigned the work schedule "N" for the current week. How does the weekly planned working time change?
  - a) Choose the team view in the TMW. In your employee list, select all of the employees that you want to display in the team view and copy them to the calendar area. Choose the *Temporarily Insert Employees* button to add your employees, 306991## and 306992##. In the upper left, choose the current week as the processing period.  
  
Check your employees' weekly planned working time in the information column on the left. Hold down the CTRL button on your keyboard and use the mouse to click on Monday through Friday for the two employees you inserted temporarily. Then double-click the time data ID "N." It is then transferred to the selected days. You can see the change in the weekly planned working time column. Save your data.
2. One of these two employees was off sick in the previous week. Record this in the system and take note of the *Employee Is Ill* totals line.
  - a) Select the previous week in the calendar on the upper left. Check the *Employee Is Ill* totals line at the bottom of the calendar area to see how many employees are ill in that week.  
  
Hold down the CTRL button on your keyboard and use the mouse to click on Monday through Friday for your two employees. Then double-click the time data ID for illness. You should see the change in the *Employee Is Ill* totals line. Save your data.



## Lesson Summary

You should now be able to:

- Customize the TMW to include the tasks and functions of the time administrators in your enterprise



## Unit Summary

You should now be able to:

- Explain the functions of the Time Manager's Workplace
- Customize the TMW to include the tasks and functions of the time administrators in your enterprise





## Test Your Knowledge

1. The Time Manager's Workplace contains the following screen areas:

*Choose the correct answer(s).*

- ☐ A Calendar
- ☐ B Details
- ☐ C Employee List
- ☐ D Info Area
- ☐ E Time Data Recording

2. All the screen areas of the Time Manager's Workplace except the Messages area can be customized.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False



## Answers

1. The Time Manager's Workplace contains the following screen areas:

**Answer:** A, B, C, D, E

In addition to all of the above, the Time Manager's Workplace also contains a *Messages* screen area.

2. All the screen areas of the Time Manager's Workplace except the Messages area can be customized.

**Answer:** True

Customizing for the Time Manager's Workplace provides many options for adjusting the layout to suit your requirements.

# *Unit 10*

## **Cost Assignment and Activity Allocation**

### **Unit Overview**

This unit describes the options for entering information about cost assignments and activity allocations and how to set them up and activate them.



### **Unit Objectives**

After completing this unit, you will be able to:

- Set up and activate cost assignment and activity allocation for time infotypes

### **Unit Contents**

Lesson: Cost Assignment and Activity Allocation .....334

## Lesson: Cost Assignment and Activity Allocation

### Lesson Overview

Activating and adjusting cost assignment and activity allocation data



### Lesson Objectives

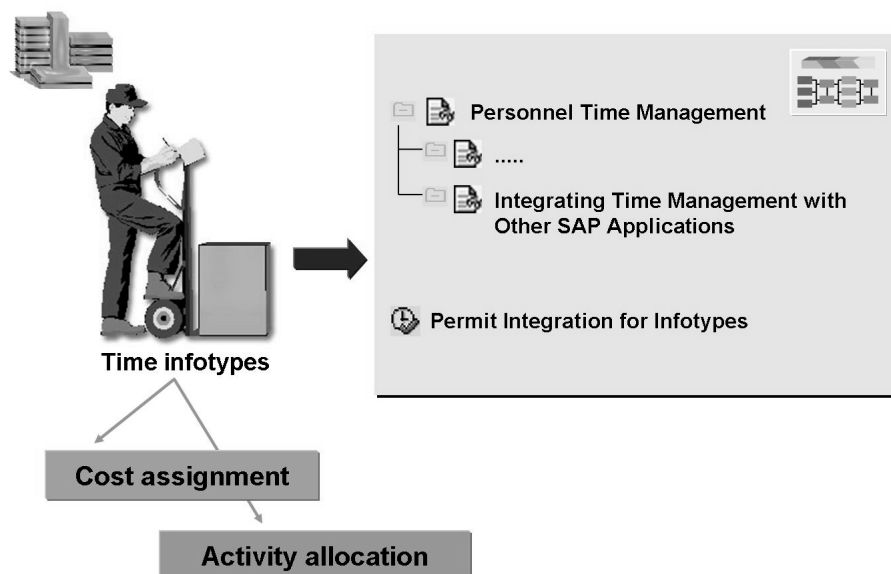
After completing this lesson, you will be able to:

- Set up and activate cost assignment and activity allocation for time infotypes

### Business Example

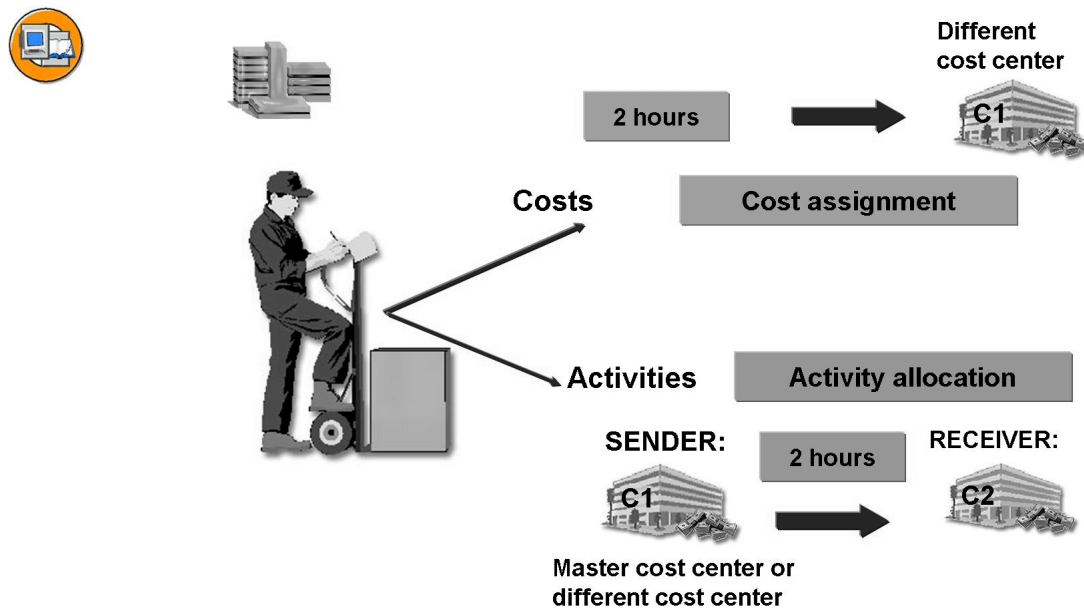
- Actual personnel costs are posted to the assigned cost center after the payroll results are transferred (cost assignment).
- In your company, activities and tasks that are stored as times are allocated internally between two cost centers (activity allocation).

### Integration with Accounting



**Figure 184: Integration of Infotypes**

In the Implementation Guide (IMG), you can specify which infotypes are permitted for integration with other areas.



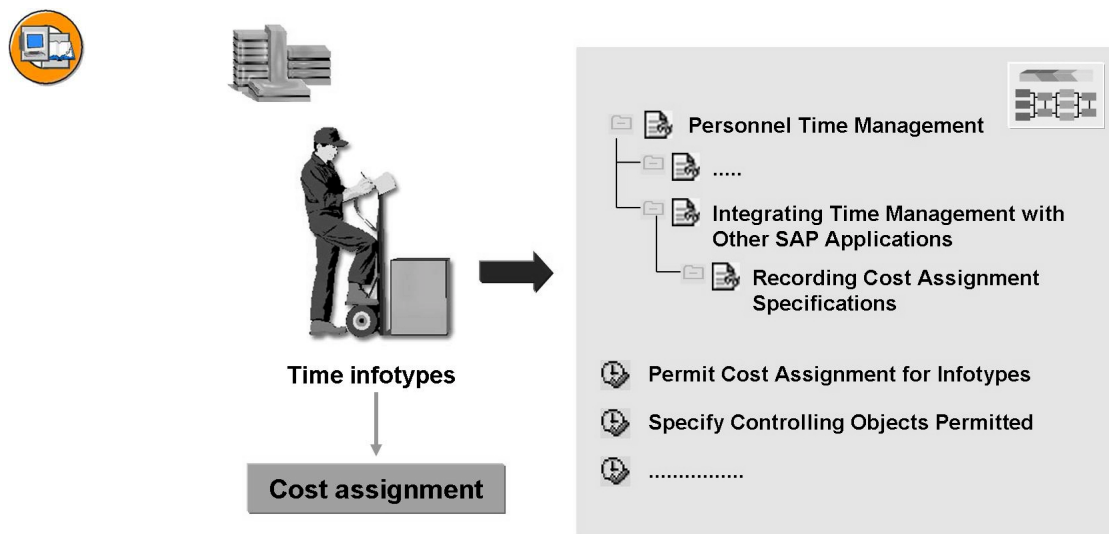
**Figure 185: Interaction with Accounting**

In time management, you can enter specifications for activity allocation (secondary cost allocation) as well as for cost assignment (primary cost allocation) along with employee time data. These options are available for certain time infotypes.

Activities performed in an enterprise can be allocated internally. Activities to be allocated internally often include employee time data when employees work for another department. If these times (activities) are to be allocated between cost centers, you enter a receiver cost center and an activity type for valuating the activity performed. The activity type allows you to value the activity with a price (rate) in Controlling. The sender cost center (usually the employee's master cost center) is credited and the receiver cost center is debited.

Sometimes the sender cost center must be changed. Sometimes the sender cost center must be changed if an employee works for a different department and these activities need to be reassigned to a receiver cost center.

The actual personnel costs are debited from the employee's master cost center after the payroll results are transferred. In some cases, the costs (primary costs) must be reposted to a cost center that deviates from the master cost center. You can specify this. In this case, the monetary amounts derived from the infotypes (primary costs) are debited from the cost center specified in the infotype.



**Figure 186: Activating Cost Assignment for Infotypes**

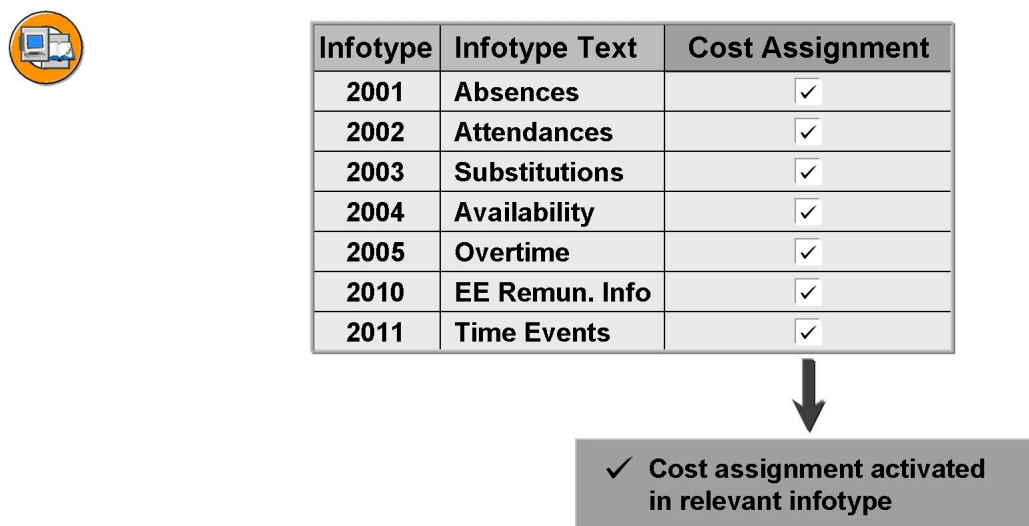
In the IMG, you can specify for which infotypes you want to enter cost assignment specifications.

The system reads these specifications to assign the monetary amounts derived from the infotypes to the applicable Controlling objects as primary costs.

The Controlling objects are debited when the payroll results are transferred.

You can link specifications for activity allocation to the following infotypes:

*Absences (2001), Attendances (2002), Substitutions (2003), Availability (2004), Overtime (2005), Employee Remuneration Info (2010), and Time Events (2011).*



**Figure 187: Activating Cost Assignment**

In the IMG, you can decide for which infotypes you want to activate cost assignment (primary cost allocation).

To do so, you have to activate the switch for cost assignment by selecting the checkbox in Customizing.

This is possible for the following infotypes: *Absences (2001)*, *Attendances (2002)*, *Substitutions (2003)*, *Availability (2004)*, *Overtime (2005)*, *Employee Remuneration Info (2010)*, and *Time Events (2011)*

This setting is relevant for time recording using infotypes as well as using the Time Manager's Workplace.



**Figure 188: Dialog Box for Cost Assignment**

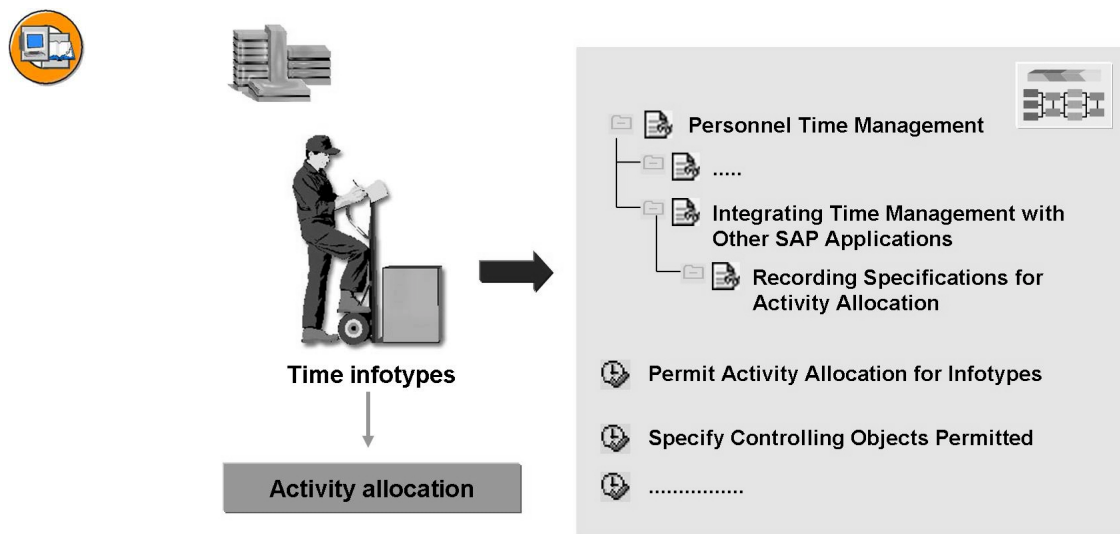
The following Customizing setting is only applicable when you record times by maintaining infotypes. It determines how the dialog box for cost assignment is to be structured for the relevant infotypes.

You can specify which Controlling objects are permitted when recording cost assignment specifications. The selected objects then appear in the cost assignment dialog box in the applicable infotypes. In addition, you can set attributes for the object fields, for example, if you want any of the fields to be mandatory.

You can also set up the dialog box in other ways.

You might want to include different fields in the account assignment section of the screen for salaried employees than for hourly-wage earners. You can control this using the **COBLT** feature.

This Customizing setting does not apply if you maintain time data using the Time Manager's Workplace. In the TMW, the field selections for time data or detail information determine which fields (for account assignment specifications, for example) are available.



**Figure 189: Activate Activity Allocation for Infotypes**

In the Implementation Guide (IMG), you can specify for which infotypes you want to enter specifications for activity allocation.

You can link the following infotypes to specifications for activity allocation:

*Absences (2001)*

*Attendances (2002)*

*EE Remuneration Info (2010)*

To use employee remuneration information for activity allocation, times must be recorded as a number of hours. If you only use employee remuneration info with amounts, then cost assignment is sufficient.

You can use the **RPTPDOCO** report to transfer these activity allocation specifications to Controlling and carry out an activity allocation (secondary cost allocation). In distributed systems, this transfer occurs asynchronously using ALE.





Infotype	Infotype Text	Activity Allocation
2001	Absences	<input checked="" type="checkbox"/>
2002	Attendances	<input checked="" type="checkbox"/>
2010	EE Remun. Info	<input checked="" type="checkbox"/>



✓ Activates additional data for activity allocation in the corresponding infotype

**Figure 190: Activating Activity Allocation**

In the IMG, you can decide for which infotypes you want to activate activity allocation (secondary cost allocation).

To do so, you have to activate the switch for activity allocation by activating the checkbox.

This is possible for the following infotypes: *Absences (2001)*, *Attendances (2002)*, and *Employee Remuneration Info (2010)*

This setting is relevant for time recording using infotypes as well as using the Time Manager's Workplace.



**Activity Allocation Specifications**

**Account assignment**

Business area  Order

Cost center  Company code

**Sender**

Cost center

Activity type

Company code

Business area

**Select fields for dialog box**

**Define field attributes**

**Figure 191: Dialog Box for Activity Allocation**

The following Customizing setting is only applicable when you record times by maintaining infotypes. It determines how the dialog box for entering activity allocation specifications is structured for the applicable infotypes.

You can specify which fields you want to include in the dialog box for entering specifications for activity allocation. The selected objects then appear in the activity allocation dialog box in the applicable infotypes.

In the standard system, the *Company code*, *Business area*, and *Cost center* fields are used for the sender; the *Company code*, *Business area*, *Cost center*, and *Order* fields for the receiver, plus the activity type. The controlling area field is displayed but is not ready for input.

In addition, you can set attributes for the object fields, for example, if you want any of the fields to be mandatory.

You can also set up the dialog box in other ways. You might require different fields in activity allocation specifications for salaried employees than you do for hourly-wage earners, for example. You can control this using the **COBLT** feature.

This Customizing setting does not apply if you maintain time data using the Time Manager's Workplace. In the TMW, the field selections for time data or detail information determine which fields (for activity allocation specifications, for example) are available.



## Lesson Summary

You should now be able to:

- Set up and activate cost assignment and activity allocation for time infotypes



## Unit Summary

You should now be able to:

- Set up and activate cost assignment and activity allocation for time infotypes



## Test Your Knowledge

1. Cost assignment and activity allocation are activated in all Time Management infotypes.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False



## Answers

1. Cost assignment and activity allocation are activated in all Time Management infotypes.

**Answer:** False

You can activate cost assignment as required in the *Absences (2001)*, *Attendances (2002)*, *Substitutions (2003)*, *Availability (2004)*, *Attendance Quotas (2007)*, and *Employee Remuneration Info (2010)* infotypes.



## Course Summary

You should now be able to:

- Explain the prerequisites for SAP R/3 Time Management
- Configure work schedules and their corresponding elements
- Set up absences and attendances and attendance/absence counting
- Set up absence and attendance entitlements and their accrual and deduction
- Configure the Time Manager's Workplace
- Explain the integration of infotypes with other applications





# Appendix 1

## Case Study: Optional Exercises for Revision

Understand the exercises in this course in context

In our case study, you hire a new employee. The data set up in the course and the corresponding Customizing settings apply to the new employee.



**Hint:** The case study deliberately does not provide a sample solution, since the aim of it is for you to test your own knowledge. You should first attempt the tasks without any help. If you have problems, refer to the relevant unit for reference. Try to work out the solutions for yourself. If you are still having difficulties, your instructor will of course be willing to help.



**Hint:** Your instructor will activate the table lock for this case study. This means that you may be informed by the system that data is already being used by another user. If this happens, wait until the user has finished making the settings, and try again.

### 1. Hiring a New Employee

Access the *Time Recording Mini-Master* hiring action (in transaction PA40). Enter the following data in the individual infotypes in the action, paying heed to the default values for planned working time from the SCHKZ and TMSTA features.

Personnel number:	306995## (## = your group number)
Hiring as of: April 1 of the current year	
Action:	Time recording mini-master Org.
assignment:	Personnel area = CABB / subarea = TP## / EE group = 1 / subgroup = X1

Personal Data:	Enter data of your choice
Position:	No assignment
Planned Working Time:	Use the schedule you created (WP##, AZ##) (Time Management status = 0)
Time Recording Information:	Skip without saving

## 2. Creating Quotas

Manually create quotas of type 30+##, standard annual leave, and 70+##, special leave, for the employee for the current year. (Alternatively, you can use the RPTQTA00 report.)

Your employee was not hired until the second quarter of this year. You must therefore reduce the quota by a quarter.

Check whether the system proposes this reduction correctly. Check the employee's quotas in the quota overview (PT50).

If you notice any errors, use the RPTQUOTA\_CHECK report to check your Customizing settings for this personnel number.

## 3. Checking the Employee's Working Times

Check your employee's working times again by using the personal work schedule (in transaction PA61). Is the work schedule assigned correctly?

## 4. Entering Absences and Checking the Deduction

Enter absences for your employee that are deducted from your quotas, 30+## and 70+##. We defined the absence type LE## for this purpose in the exercises.

Create substitutions, availability duties, and overtime.

Pay attention to how the system handles collisions.

Check the quota deduction. You can use quota overview (transaction PT50) or reports such as RPTQTA10.

## 5. TMW Calendar View

Have a look at the settings in the TMW calendar view.

Check the absences and the work schedule in the appropriate view. If required, maintain other data in the TMW calendar view, as suggested in task 9 of the exercises for unit 10.

# *Feedback*

SAP AG has made every effort in the preparation of this course to ensure the accuracy and completeness of the materials. If you have any corrections or suggestions for improvement, please record them in the appropriate place in the course evaluation.